



2021 TRENDS, DEVELOPMENTS, DEALS & PLAYERS IN DIGITAL FITNESS & WELLNESS

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Industry Insider Presentation



Ross Campbell &
Blair Campbell
FIT Summit

www.thefitsummit.com

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GLOBAL TRENDS OVERVIEW

“Wellness is now a \$1.5 trillion market globally and trending up — growing at 5-10% each year with consumers most interested in six wellness categories: health, fitness, nutrition, appearance, sleep, and mindfulness” — [McKinsey](#)

Boutique, luxury and lifestyle focused brands are growing in popularity, as are high-value, low-cost, multi-modality brands, as consumer behaviour changes again to seek experiences, and social connectivity.

Investor appetite and confidence are also heightening including a recent series of high-profile capital raises, acquisitions ([CP & MBO](#), [XPO & BFT](#)) and IPOs ([F45](#), [SmartFit/BioRitmo](#), [Xponential](#), [Beachbody](#), [LifeTime](#), and soon possibly [Pure Gym](#) and [Xplor](#))

As consumers return to gyms and clubs, demand remains high for (i) at-home, (ii) outdoor and (iii) digital offerings – to thrive, our industry must deliver omni-channel experiences; wherever, whenever and however our members demand, and on their terms

Data will drive, and technology will enable our industry to become more measurable and hyper-personalized – businesses are leveraging larger tech stacks, numerous SaaS services, wearables, AI and marketing automation to engage consumers frequently in their daily lives.

Businesses continue to diversify and offer more holistic services and partnerships – new group class formats, digital workouts, virtual personal training, lifestyle coaching, nutrition advice, mindfulness, mental health, biohacking and recovery.

Culture and community will become more digitally prevalent, frequent digital touch points augmented with greater in-person social interactions. To connect deeply to consumers, branding will become edgier & emotive whilst balancing the need to pander to a woke culture.



WHO WILL SHAPE TOMORROW'S INDUSTRY



International portfolio companies becoming stronger
EW, FLG, Xponential, RSG, Self Esteem Brands, Viva Leisure, Pure Gym, Belgravia, Lift Brands, Armah Sports, Holmes Place, Collective Wellness Group, Smartfit/Bio Ritmo



Best-in-class regional franchisors going international
Jett's, KX Pilates, Body Fit Training, UBX, Fitstop, TRIB3, Fire Fitness, Ritual, energie Fitness



Best-in-class regional independents to continue regional growth
GO24, UFIT, Warehouse Project, GymNation, Revo Fitness, Absolute You, Yoga Movement



Best-in-class content creators strengthening presence and influence
Peloton, Apple+, Les Mills, iFIT, Technogym's MyWellness, Alo Moves, Cure.fit, Frame



Wearable tech companies with greater analytics and more holistic performance data
Whoop, Apple Watch, Oura, Oppo, Samsung Watch, Garmin, Fitbit



At-home fitness
Peloton, Echelon, Hydrow, Mirror, Tonal, Tempo, Mirror, CLMBR, Vitruvian, Future, Reform RX – becoming commercially minded (home to club to hotel to office)

WHY DIGITAL, WHY NOW

“As in many other sectors, the big opportunity for digital in fitness is to improve success rates (number of lives improved as a result of moving more and better), not to replace existing solutions altogether. Healthcare and education stand out as interesting analogies. The starting point is one where solution providers are highly committed and passionate about helping their members/ customers, but not successful as often as they’d like. Most people still give up on their new routines or ambitions just weeks or months into it. Digital mediums offer an outstanding opportunity for passionate providers to further help people along the three dimensions which are most tied to ‘success’: sense of belonging/ community, guidance, motivation. It’s a quest to augment success rates, not to replace in person training.”

Eric Falardeau,
Partner & Head, Fitness & Wellness
McKinsey & Company

McKinsey
& Company





“Much of 2020 was spent firefighting and figuring out how to run the business with the pandemic raging. 2021 saw businesses being tweaked, and the industry showed itself to be extremely resilient, innovative and creative. Most fitness businesses had digital offerings on top of the in-person offerings, and it is now clear that digital offerings will co-exist next to what gyms and studio have traditionally offered.”

Sean Tan

Director, True Group, and President, SG Fitness Alliance

TRUE GROUP



MARKETS INVOLVED IN DIGITAL FITNESS & WELLNESS



SOME KEY PLAYERS IN DIGITAL FITNESS & WELLNESS

<i>Alo Moves</i>	<i>Apple Fitness+</i>	<i>Beachbody</i>	<i>Cure.fit</i>	<i>FIIT</i>
<i>FitOn</i>	<i>Fisikal</i>	<i>FitnessOnDemand</i>	<i>FORTE</i>	<i>Freeletics</i>
<i>Fiture</i>	<i>Glo (Yoga)</i>	<i>iFIT</i>	<i>Intelivideo</i>	<i>Keep</i>
<i>Les Mills</i>	<i>MindBody/ClassPass</i>	<i>Mirror</i>	<i>Peloton</i>	<i>R Fitness</i>
<i>Salut</i>	<i>SH1FT Fitness</i>	<i>Sweatworks</i>	<i>Technogym</i>	<i>TRX Training Club</i>
<i>Uscreen</i>	<i>Wellness Solutions</i>	<i>WellteQ</i>	<i>Wexer</i>	<i>WithU</i>

EMERGING COLLABORATORS & COMPETITION IN DIGITAL FITNESS & WELLNESS



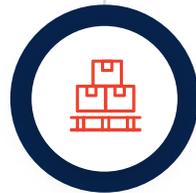
Facebook / Google / Amazon [Halo] / Netflix – inevitable future evolutions where content creators/platforms realize the growing commercial potential of health-related content and invest themselves



Insurance Companies – acquiring or white labelling solutions to create gamified and reward-based wellness products for their premium holders (reducing risk, claims and premiums)



Governments and Health Ministries – wanting to own and create new content and facilities for health promotion, grassroots sports development and overall citizen wellbeing



Equipment manufacturers – producing more original content for both commercial and retail clients, in addition to more digitized equipment lines (**EGYM, Life Fitness, Myzone, Precor, Technogym, TRX**)

DEAL FLOW OBSERVATIONS



New unicorns emerging – **Gympass, Keep, Supermonkey, Tempo, Tonal** – throughout the pandemic via successful capital raises



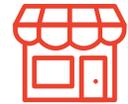
Connected fitness continuing to raise capital to develop new customers and content including **CLMBR, Echelon, FightCamp, Liteboxer, Fiture, Jaxjox, Hydro, Tempo and Tonal** (in total over USD\$2bn raised in last 18 months)



iFIT acquires **SWEAT** and **29029** showing increasing demand for content/experience acquisition, especially from larger companies as they expand internationally. **Mindbody** acquires **ClassPass** to create super-platform for fitness and wellness.



Strategic partnerships blossoming to create scale, diversity, geographical access and greater stickability (**ABC Fitness, Glofox, Intelivideo, Les Mills, Matrix, Nautilus and NEOU** and others striking alliances)



The eastern hemisphere also expanding west – **Cure.fit** acquires **Onyx and Tread** and raises \$75M to break into the North American market

Evolution Wellness announced a major new partnership with digital fitness leader **Wexer**, whereby Wexer becomes the group's exclusive platform and third-party content provider in the roll-out of Virtual Studio – Evolution Wellness's online fitness space. They launched in mid-July, and successfully onboarded 15,000+ subscribers in the first six weeks.

Willow Health Clubs launched Willows Digital, a digital membership (leveraging **Les Mills** virtual). Whether you're looking for workout videos, online training programs, wellness podcasts and articles from leading health experts we have it all for you. You are one click away from starting today!

Fitness First MENA launched Fitness First At Home - Join The Movement and our group exercise team with your family and stay active while staying at home. Join our daily livestream classes on Instagram and 30-minute classes on YouTube to stay fit – workouts, online PT and guided meditation.

Ultimate Performance launched LiveUP – online coaching and progressive training plans, at home or in-gym. Fast-track to a healthier, happier you with LiveUP – the budget-friendly way to work with the world-leading personal trainers from Ultimate Performance. Monthly Payment: £65



BIG CLUB STRATEGIES & INNOVATIONS



FRANCHISE STRATEGIES & INNOVATIONS



F45 rolled out F45 AtHome. With our on-demand workouts, achieving your fitness goals has never been easier. Train alongside us each day—on your own schedule—by accessing F45 AtHome Workouts via the F45 Challenge app or website.



Xponential released GO! Use your GO subscription with 8 world-class on-demand platforms. GO is a tailored workout designed for our studios, but meticulously recreated for your living room, gym, bedroom, park, anywhere you can take your phone or computer



12RND and UBX created TRAIN: ON DEMAND. Boxing + Strength Training, Nutrition and Mindset whenever and wherever you need it. The ON DEMAND app gives you the ability to train with us anytime you want.



Orangetheory Live is an all-new interactive experience that brings the workouts you love directly to you, wherever you are. It connects the science, coaching, technology and motivation experienced inside an Orangetheory studio to you, virtually.



Barry's launched Barry's X - community-driven virtual classes that connect with your instructor and other class participants through live classes; or choose from an extensive catalogue of on-demand fitness content.



INSIGHTS INTO BOUTIQUE STRATEGIES



Ritual Gym expanded from their four walls to offer Ritual Fit, the personal training app for all walks of life. Optimize your exercise with the latest advance in personalized, high-quality audio coaching. From just \$10/month.



Physique57 launched On Demand, 300+ Workouts – all levels and lengths. Adaptable to any space. Create playlists. Download workouts. Calendars and Meal Plans. Starting at \$ 24.99 /month.



R Fitness (formerly RIDE) consolidated their studios and launched a new digital first business. R Fitness is now one of Indonesia's largest online and offline wellness apps/brands, offering holistic mental and physical health classes and seminars in 5 different locations.



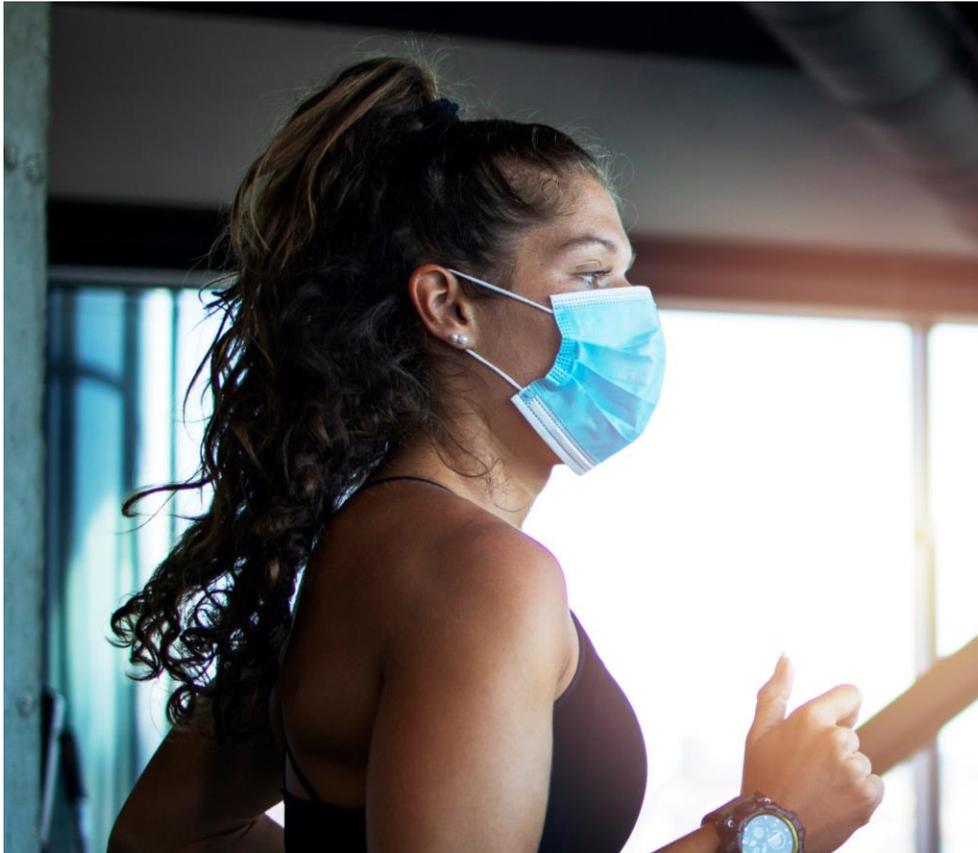
In 2020, **Electric Studio**, the Philippines indoor cycling boutique, became the first studio in the country to fully shift to virtual classes with Electric At Home. Now, the signature Electric experience is accessible anytime, anywhere through our Live Zoom classes and our On Demand platform.



Yoga Movement, one of Asia's leading yoga and lifestyle brands, pivoted to bring you YM Live, a series of online classes that are small in size but BIG in community! Priced at the same price as in studio classes they continue to grow in popularity.

2021

REFLECTIONS & STATISTICS

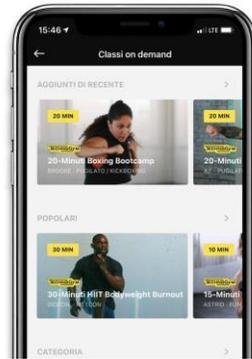
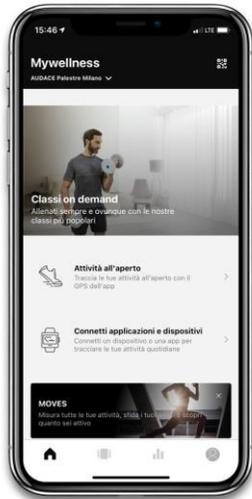


“Consumers expect to make more of their Fitness and Wellness purchases online compared to pre-COVID times: 25-30% increase in the number of consumers purchasing the category online.

75-80% of people who have started to use or increased their usage of a Fitness app since March 2020 plan to keep using it going forward.”

McKinsey consumer
sentiment survey US
December 2020

McKinsey
& Company



“In 2012 we launched Wellness on the go: the possibility for people to get access to their personal training program, anytime and anywhere: at fitness clubs, at home, at work, at hotels, outdoor thanks to our app. Today we are, more than ever, focused on the biggest project in Technogym’s history: to support operators in offering their members engaging training experiences both inside and outside the facility thanks to connected smart equipment, apps and on-demand video content developed both by Technogym and by the fitness operators.”

Nerio Alessandri
 Founder & President,
 Technogym



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"While many headlines characterize consumers as either gym-goers or app users, our data continues to suggest that consumers are not merely binary in how they consume fitness and validates our ambition to be the most accessible boutique brand on the planet."

Garrett Marshall
President, Fitness Streaming,
Xponential

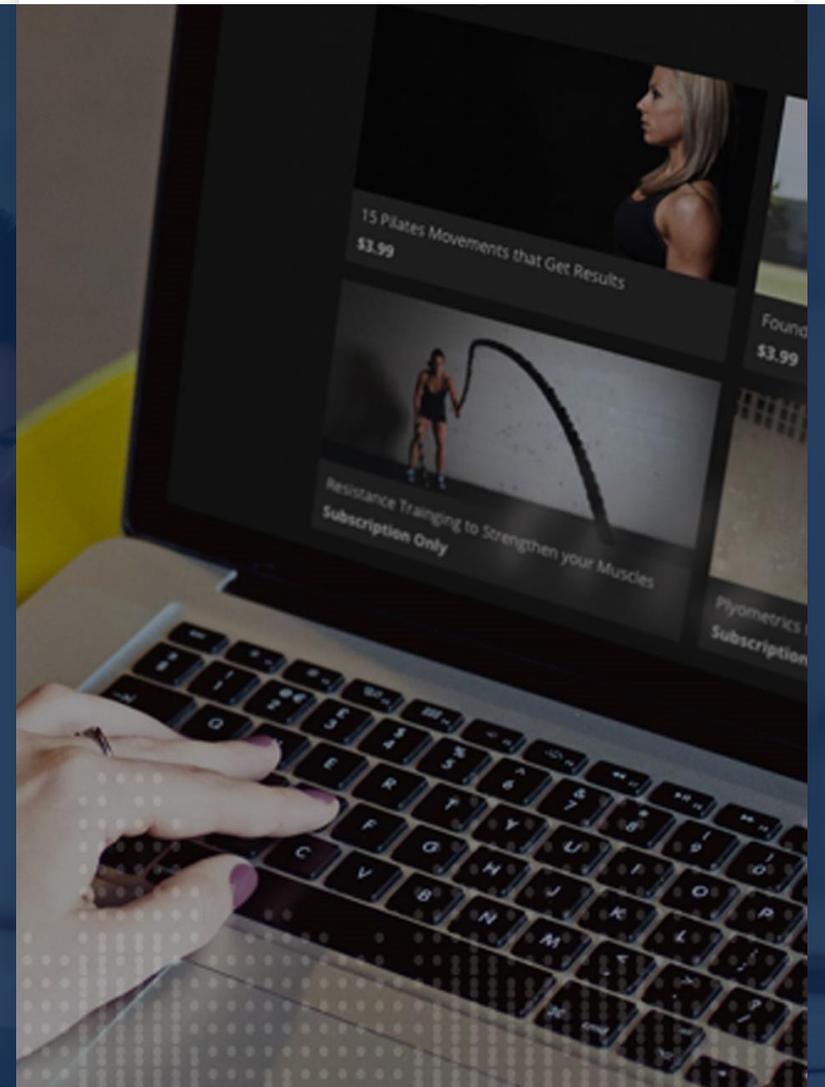
The logo for Xponential Fitness, featuring a stylized blue 'X' followed by the word 'PONENTIAL' in blue and 'FITNESS' in smaller blue letters below it.

XPONENTIAL
FITNESS™

“Coming out of 2020, where we saw record growth in client acquisition and platform utilization, Intelivideo has been fortunate to sustain both in 2021. The fitness industry has realized that digital fitness is no longer just a quick fix - it has become a consumer expectation and is an important contributor to our client’s ability to engage their members long-term. In fact, operators who have a brick-and-mortar facility, and offer a hybrid digital option with their memberships, are finding that their members are working out an average of 3.8 times/month digitally in addition to their in-club workouts. They are also seeing a 22% increase in the lifetime value of their hybrid members over the course of the last year. These findings continue to demonstrate that digital fitness is here to stay and that hybridization is now a requirement in the future of the commercial fitness industry.”

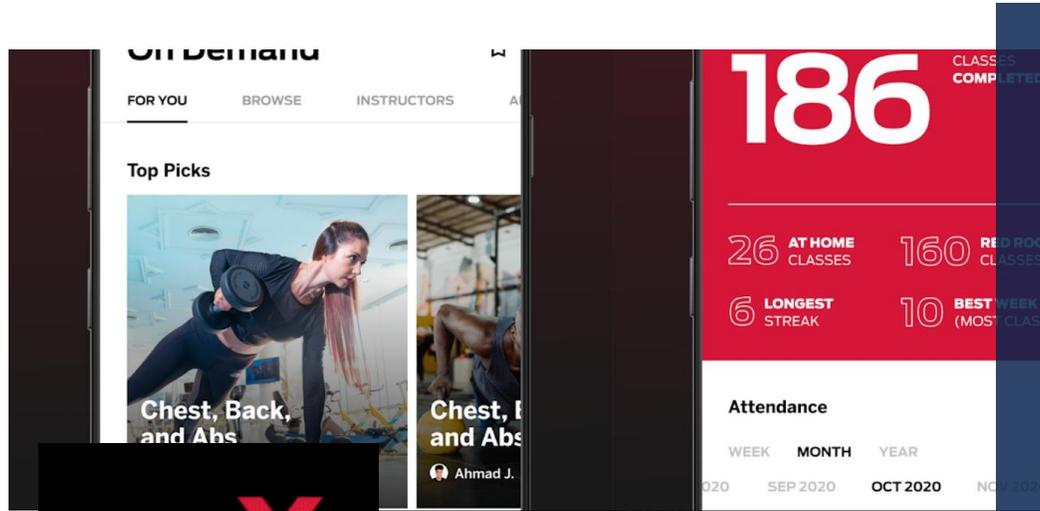
Adam Zeitsiff

President & CEO, Intelivideo



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"The pandemic and resulting closure of our studios required us to rapidly innovate our business model in order to remain connected to our global community. The result was the launch of Barry's X, a sophisticated digital product that utilizes proprietary "camera-on" technology to bring key touch points of the Barry's experience and Red Room into a digital setting. Barry's X allows our clients to interact with each other in a manner that is very close to an actual in-person setting and allows us to transform lives on a much larger scale than ever before."

Joey Gonzalez
Global CEO, Barry's

INTRODUCING **BARRY'S X**.
AN UNMATCHED WORKOUT
ANY TIME AND ANYWHERE.



“During the pandemic lockdowns, our online classes saw huge uptake which have brought in a large segment of new-to-fitness users into the fitness ecosystem. We have also expanded our online and offline footprint via 3 acquisitions - Fitternity, a fitness facilities aggregator, Onyx, a US-based company specializing in AI-based body tracking technology, and Tread, a smart fitness bike start-up. We are now focusing all our efforts to building out an all-encompassing hybrid fitness model where a user with a Cultpass can access any of our offline and online fitness and sports experiences. We are now growing at a faster rate than we did pre-pandemic. Our Dec-end numbers on revenue run rate, #subscribers, offline centers footprint is expected to be around 1.5x of our pre-pandemic numbers.”

Shamik Sharma

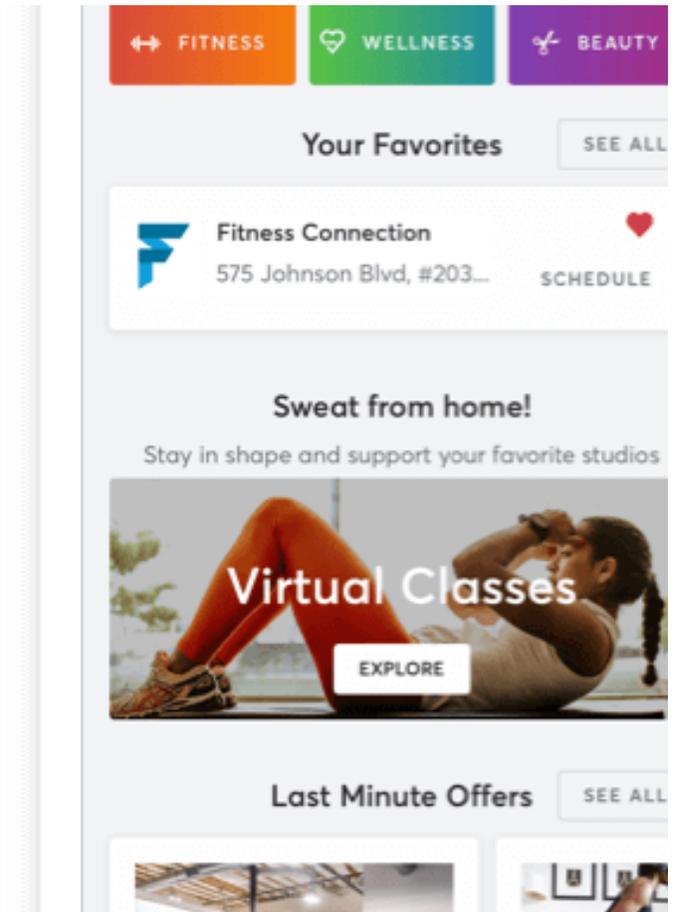
Head - Digital Business,
Product & New initiatives, **Cure.fit**

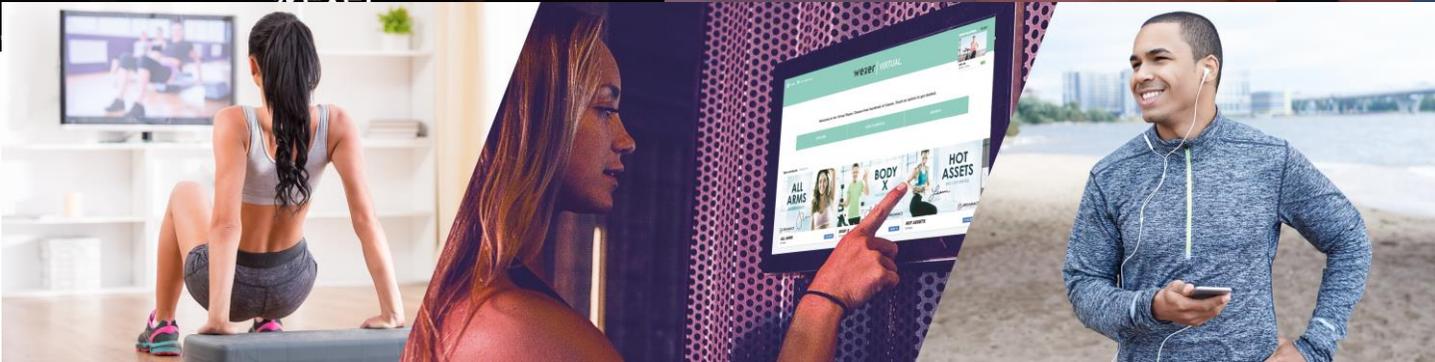


“Technology isn't here to replace the human connection you've built your business around—it's a way of bringing that connection to more people, in a way that best suits their needs or preferences. Based on Mindbody's consumer research, 33% of Australians will participate in live stream workouts at least once a week, even when fitness studios are open in person. The number of video-on-demand watched by APAC consumers in August, has surpassed the amount at the start of the pandemic. Therefore, it's imperative that your business offers virtual services as a seamless extension of your what you're already offering, and is one more way to add to your bottom line.”

Hema Prakash

Vice President and Managing Director, APAC, **Mindbody**





“Two stats to inform your strategy for 2022 and beyond. 1) 58% of members expect a club to provide a physical+digital hybrid offering. 2) 52% are prepared to pay for it. Let the first inform and the second motivate. Plan to have 25%-50% of your members engaged and paying for your online service in the next 12 months. If you don't, you're leaving your money on the table and neglecting their motivations to stay fit.”

Sam Aldred,
Head, APAC,
Wexer

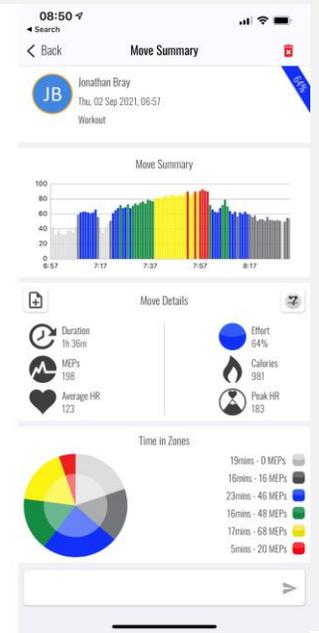
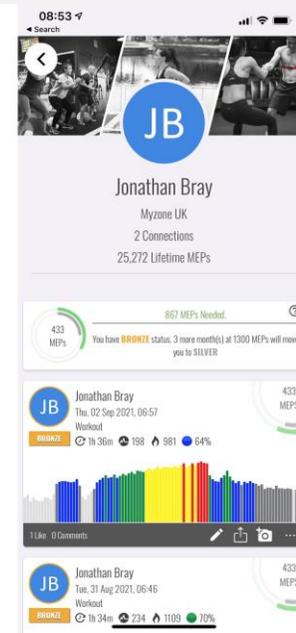


2021 REFLECTIONS & STATISTICS



“Myzone audits over 4M workouts per month around the world. Pre-COVID, 63% of sessions were performed in facilities, in April 2020, it was only 3%, in Sept 2021 42% of sessions were in clubs. The world won’t return to the same shape as 2019, brick and mortar workout volume will undoubtedly recover further, but digital and out of gym workouts are here to stay, the challenge is being omnichannel and meeting the members where they are. The brands that win will be the brands that help serve fitness right where the customer wants it – everywhere. “

Emmett Williams
CEO, APAC, Myzone



2021

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LesMILLS ASIA PACIFIC

"2021 was a challenging year in our Asia Pacific region; some clubs in the Philippines, for example, have been closed for more than 18 months. But the future looks bright because compared to pre-pandemic times, club visits in New Zealand are at 110%, and sale conversions at 108%. The 'Live Revival' that the [Les Mills Global Fitness Report](#) identified, means opportunities exist for clubs to expand their offerings and cater to the fact that 80% of people will continue to blend in-club with at-home workouts on a 60/40 split basis."

Ryan Hogan, CEO, APAC, Les Mills



“Physique 57 was recognized with Mindbody’s Industry Icon award for partnering to launch their Virtual Wellness Platform in 2020, and we have continued to grow our virtual audience well into 2021. Clients have joined Physique 57 classes from 41 US states and 25 countries. More exciting is that 40% of our virtual clientele is completely new to Physique 57. Now that we have reopened studios, almost all of our studio classes are broadcast live and new clients keep joining the community. Hybrid is here to stay!”

Jennifer Vaughan Maanavi
Founder & CEO, **Physique 57**





2021

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“Businesses that had a presence online pre COVID-19, saw growth in their streaming service monthly recurring revenue (MRR) by ~30%. Also, brick and mortar businesses that took their classes and workouts online with Uscreen, with no previous online presence, earned ~\$50k in their first month. This growth isn't slowing down.”

PJ Taei

Founder & President
Uscreen



uscreen We're Hiring! Platform ▾ Examp

Grow Your Streaming Business

Email Us: sales@uscreen.tv

Start Free Trial Chat Now

iPhone android Apple tv





“Along with the many painful lessons that we've learned through this pandemic, there have also been some true beacons of light that have emerged. Our app, Ritual Fit continues to grow and evolve at a healthy rate, justifying our continued investment and focus in the digital space in order to give a truly hybrid solution to our existing members, as well as put our brand in front of members who may not have access to one of our brick and mortar outlets. However, the biggest learning is that when the gym isn't available due to government restrictions, it is deeply missed by our customers and they truly appreciate being back in our facilities when they reopen. There's still magic in group fitness, and that isn't going away.”

Brad Robinson
Co-Founder & CEO
Ritual Gym



RITUAL
THE 30-MINUTE GYM.

2021

REFLECTIONS & STATISTICS



“Just like everyone in the fitness industry Zumba had to embrace virtual fitness in order to provide continued work for our ZIN and SYNC members and help support the fitness facilities by providing virtual programming to their members - trying to keep the community feeling intact. We sponsored large virtual master classes with thousands of attendees that our gyms and fitness trade show partners promoted to their members, keeping the facilities and organizers top of mind to their community and assist in bringing new members into their network. We launched www.zumbadance.com which hosted over 700 workouts every day, truly bringing the world together enabling our ZIN members to be promoted to a global audience.”

Petra Robinson
Senior Advisor, Zumba Fitness



FAST SESSION

“Fitstop has a large focus and investment in a hybrid franchise system where we build both an online and offline community. I believe the fitness industry must focus not only on in person attendance and experience but also their digital one. Fitstop is focused on increasing the lifespan on a member by tracking personal performance data, number of sessions both in person and online as well as time spent in app”.

Peter Hull

Founder & CEO, Fitstop

FITSTOP.



360Wellness

Grow Your Fitness Training Business

With the suite of business solutions - A Web-App built for fitness trainers & coaches



The smartphone screen shows a circular wellness tracker with four quadrants: **FITNESS** (12%), **FEEL** (75%), **NUTRITION** (30%), and **RECOVERY** (88%). In the center, it displays **185** out of **360**. Below the circle, it says "My next event" and "SCHEDULE YOUR NEXT LIVE VIRTUAL CLASS". At the bottom, there is a button "Select Your Target for Nutrition" and a date/time "Thu 24/10 12:30pm".

**WORLD'S FIRST WELLNESS TRACKER
- ONLINE FITNESS CLASSES**

“Fitness and wellness instructors lost 100% of their revenue overnight during the first lockdowns. They came out of this crisis with a more resilient and diversified offering with a clever mix of online and onsite coaching services. They are now looking for the best platform to operate this new hybrid business and that's what 360Wellness is offering them. Over the last 3 months over 615 Trainers across 20 countries have already registered to our platform.”

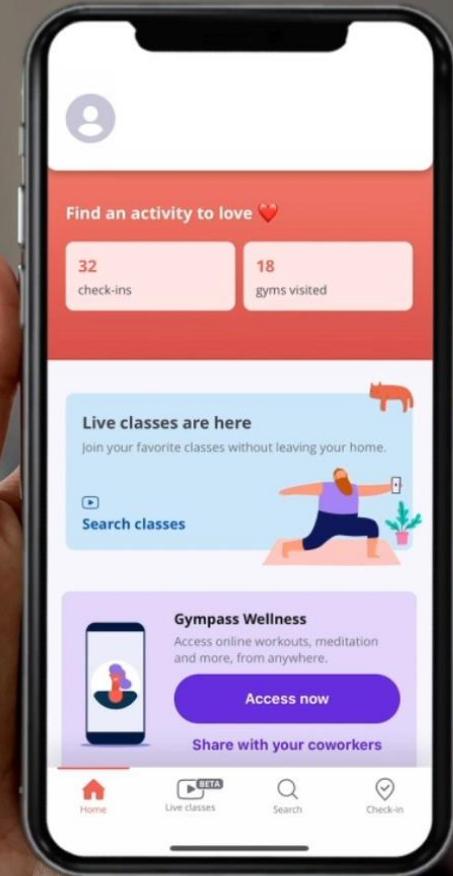
Kevin Serou
Founder & CEO
360Wellness



"In 2021 our clients and customers have been able to experience the full effect of our evolved fitness ecosystem - now globally consisting of +50,000 gyms, studios, live-streamed classes, online Personal Trainers and a library of leading health and fitness apps. As a result of permanently altered lifestyles and working patterns, we continue to see a consistent MoM growth in demand for digital fitness, reaching over half a million check-ins to digital products in September alone. More importantly, we can see the future of consumer trends beginning to take shape, as digital products become embedded into wider fitness routines; 67% of our digital users are now using online resources alongside visits to their chosen gym or studio, to provide a more effective and holistic approach to their overall wellbeing."

Massi Sardi,
Managing Partner, **Gympass**

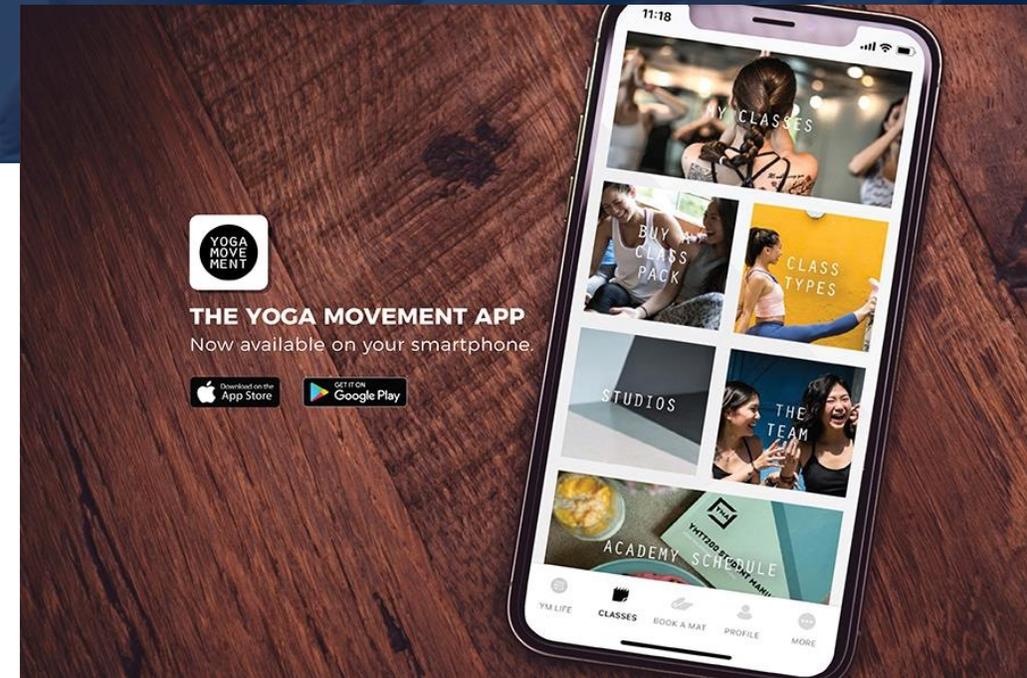
Gympass



“We had a strong belief, even at the very start of the pandemic, that going digital meant going borderless. We focused on replicating what we were known for... stellar, community driven, and quality yoga classes, just in a digital room. The teachers were real time, we had SOP’s around their at-home “sets”, class sizes were limited, there was required levels of engagement, and we charged full price, with the guarantee that you were going to get the next best thing to being in-venue. A year and a half on and YM LIVE is an important part of our brands offering. It will outlast the pandemic and will be developed further, with the vision of making it even more compelling and seamless.”

Peter Thew

Co-Founder, **Yoga Movement**





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“October saw our global instructor survey go out to fitness professionals in over 40 countries. While everyone agrees that nothing beats a live class, 62% of our instructor base say they will continue with a hybrid approach (both live and online classes) permanently. This is driven not just by customer demand but by the low cost and convenience of teaching virtually.”

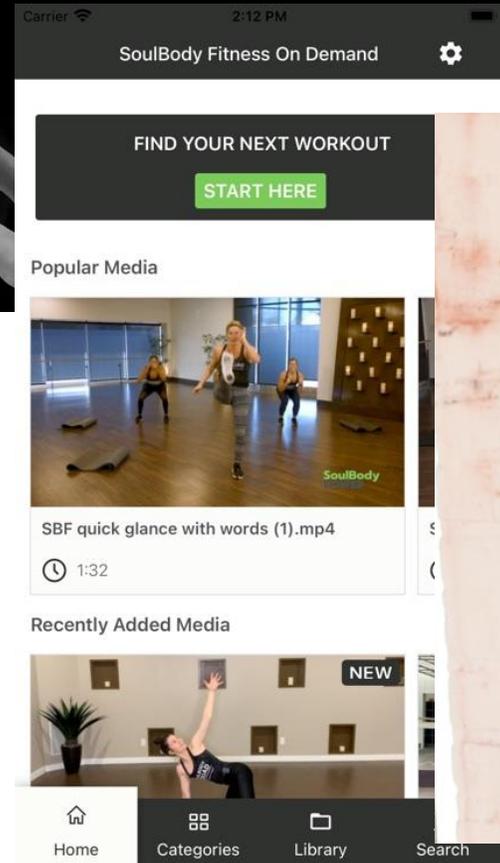
Will Brereton,

Founder & CEO,
SH1FT Fitness



LIVE STREAM TRAINING!

JOIN THE SQUAD GET CERTIFIED
inspire through movement



“Now that health clubs are reopening and people are looking to return to their workout in person, an on demand offering is an added amenity that not only enhances the in club experience, but gives the members an option for working out whenever, wherever with the fitness brand they already trust. However, the platform a club chooses to support this initiative, for example like the one from Intelivideo, needs to be streamlined for a hybrid fitness model and seamlessly integrated into a club’s POS system in order to deliver a high-quality and easy-to-use solution to members. From what I have seen, in-house development is cost-prohibitive, demands extra resources and hasn’t proven successful for independent operators.”

Stacey Seward Vandiver

Owner & CEO

SoulBody Fitness



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“FORTĚ YTD revenue increased 330% from the same period the previous year due to new client launches and increased adoption of digital from the client's digital platforms that FORTĚ powers. Usage remains at elevated levels, member engagement has increased with the addition of digital, and members across all clients watch live-streamed content within 30 hours of being live-streamed and prefer not to rewatch content.”

Lauren Foundos
Founder & CEO, FORTĚ

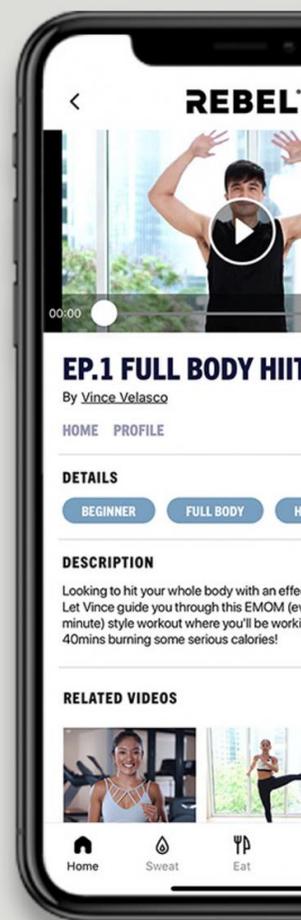
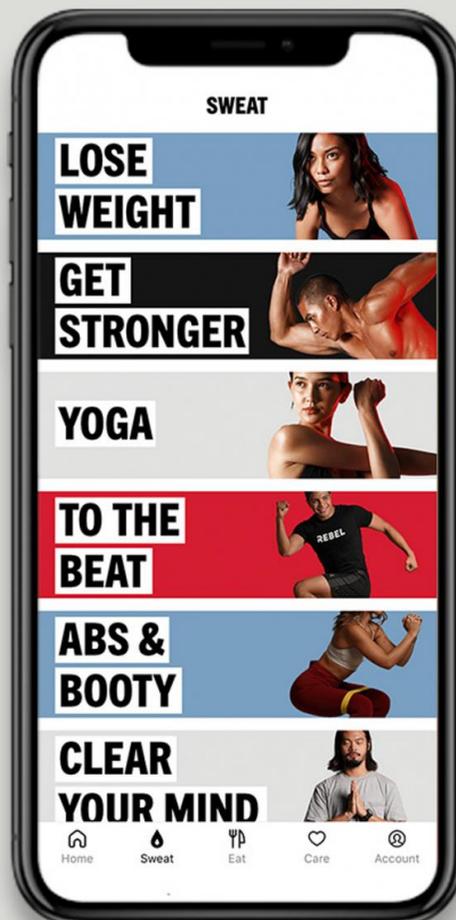
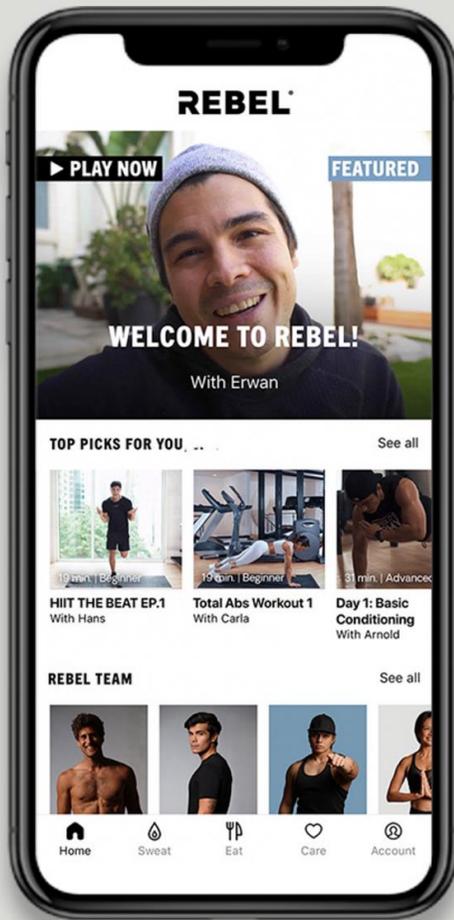




“Following the success we enjoyed in 2020 with the launch of FLEX, we saw further adoption of our virtual platform by our commercial operators. The extension of the user experience and accessibility of programming from the club to their members, where ever they are, resonated. In general, this is a trend you will notice, the operators have to be able to compete with the myriad of choices the end users have. In addition, we launched live streaming on our platform in September 2021. This enables the operators host live classes on the same platform that they deliver virtual content. So far this year, we have had 9M minutes viewed with average video completion rate of 18 mins per video. This is the most important statistic in the industry in my opinion. It speaks to the adoption and engagement of the popular content we carry and the ease of use of our platform. The digital experience is a key factor going forward for any club operator.”

Uday Anumalachetty
Divisional Vice President
FitnessOnDemand





“We launched REBEL in September 2020 and in our first year we’ve seen over 300,000 users sign up and complete millions of workouts with us. Most of these people are from South East Asia and many are exercising, cooking healthier food or meditating for the first time in their life. It shows that by leveraging technology and content to make health and fitness accessible to a wider demographic, you can unlock a healthier lifestyle for millions who just need the right support to get started.”

Gilles Hage
Founder & CEO, REBEL

REBEL[®]



Transformation

“We developed our new online platform, Kamalaya Connect. This digital gateway allows guests to experience the very best of Kamalaya from anywhere in the world. With Kamalaya Connect users gain access to custom-made wellness programs and receive personalized support from our expert practitioners with one-on-one consultations. Additionally, engaging podcasts and helpful life-hacks on health, food, and wellness are also available via Kamalaya Connect. Simply put, Kamalaya Connect is the authentic Kamalaya experience in the comfort of your own home.”

John and Karina Stewart
Co-Founders, Kamalaya



CREATING SUCCESSFUL VIRTUAL STRATEGIES



Content and community remain king and queen with both becoming increasingly important in customer acquisition and retention. Summarized here are lessons learned in how to win in the digital space:



Bite sized content is more easily digested and in greater demand – don't over-deliver on time, over deliver on quality and experience first



Can your content be white labelled? White label content, especially culturally diverse content, will be in high demand by international companies



Choose a good partner, not just a good platform. Ideally you want to outgrow your platform, not your partners – think long-term.



Create the best, borrow the best – focus on quality content production, supplement with third party content for scale, breadth and depth



Ensure your content strategy truly reflects your brand and your culture – it should not differ from in-club – be online who you are known to be offline



Focus your long-term attention on on-demand offerings vs livestream offerings (greater long-term revenue potential, utilization and lower cost)



Know who your competitors are locally and internationally, and how to differentiate yourself from them in experience and marketing



Price bundling is key – offer digital as (i) a value-add or (ii) an incremental top-up to your premium membership



Invest in your digital offering with people, time, energy and money – it is a cost of goods, not a cost



Team buy-in is essential to ensure digital is recognized and respected as a long-term strategic and commercial revenue line



Utilize 'try before you buy' strategies – women especially will purchase products having test-driven them (minimal CAC)



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For more information on
FIT Summit please contact:

Ross Stewart Campbell

Founder & CEO

m/WhatsApp: +65 8268 9834
e: ross@thefitsummit.com

Blair Russell Campbell

Head, Industry Development
(Fitness/Wellness/Hospitality)

m/WhatsApp: +62 821 4527 3519
e: blair@thefitsummit.com

www.thefitsummit.com

