

# **Understanding the customers' needs of Generation Y & Z in the fitness industry**

**Bachelor Project submitted for the degree of  
Bachelor of Science HES in International Business Management**

by

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**Geneva, August 20, 2022**

**Haute école de gestion de Genève (HEG-GE)**

**International Business Management**

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## **Acknowledgements**

First of all, I would like to thank my mentor Mr. Ansar Hafil who has been a great help with his suggestion about the direction this work had to take and for his benevolence towards me.

Furthermore, I want to sincerely thank the professionals, I interviewed for their time and contribution to the outcome of this work. The insights gathered through the interviews conducted me to deepen my understanding of this industry for which I have a great passion. I would like also to thank my family as well as my close friends for their interest in my work and for their valuable suggestions.

Finally, I would like to express my gratitude to all the people who participated in my survey at my express request, knowing that it was a painful exercise to bothering people with that, as I do not like surveys myself, I am grateful for the kindness of people towards me and their contribution to this work

## Executive Summary

The populations of Western countries are increasingly sedentary and affected by a rate of overweight more and more important. The fitness industry, in this context, has an important role to play in order to provide the population with adapted infrastructures that will allow the practice of a physical activity essential to a healthy lifestyle for individuals but also to promote it in order to incite people to be more active on a regular basis in a perspective of health and well-being. According to statistics from Switzerland, to take this geographical area as an example, the overweight of individuals in the overall population, young people included, is constantly increasing but the demand for fitness facility is as well in the urban area. The offer of sports clubs has never been so abundant in the major Swiss cities and this despite the recession period of Covid 19 between 2020-2021. The fitness industry is an extremely competitive market with low barriers to entry for new competitors and low transition costs for customers. This study can be approached as a market analysis to inform current and new entrants into the fitness industry on how to best compete and attract the Y and Z generations that represent no less than the two third of gym goers today. We will identify the best way to target, attract and retain these generations to practice a physical activity in a gym by using the current knowledge we have on marketing and by investigating the needs of these segments of the population. This study is divided into several steps. The first one is focused on the services that these segments demand the most and on the factors that are the most likely to make them come to a sport center rather than another one. This part will be realized through the use of a survey and directly addressed to the individuals of these segments of the population in the French speaking part of Switzerland with an emphasis on Geneva. In a second stage, it will be interesting by the opinion of some people working in this industry. Interviews will also be conducted with professionals such as fitness coach and fitness center owner in the Geneva area in order to collect their opinion and their feelings about the needs of customers to date and their feelings about the evolution of the industry. Auxiliary factors that the survey does not capture, such as the influence of communication channels and the values perceived by fitness users in their decision-making process will also be addressed in the literature review available to date. A holistic approach is used in this thesis, integrating the exploration of survey data, scientific literature conducted in several related disciplines to establish the factors that fitness facility owners must consider when deciding on the steps to implement a suitable business model that take into account the needs of generation Y & Z in this industry.

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# 1. Introduction

## 1.1. Context of the study

Western society is characterized by a constant increase in the level of sedentary lifestyle due to multiple factors such as technological advancements and the increase of jobs in the service sector involving little physical activities (Woessner et al. 2021). While these improvements in the average comfort of living are globally positive and contribute to the increase in life expectancy for the populations concerned, it should be noted that a negative aspect taints this picture: sedentary lifestyle is strongly correlated with overweight and so obesity (Martínez-González et al. 1999). Overweight and more particularly its extreme form, obesity, is a major societal concern in developed countries and represents a major risk factor for the onset of non-communicable diseases such as heart disease, stroke, diabetes, musculoskeletal disorders and even some cancers (Must et al. 1999; World Health Organization 2021).

The United States in particular is often cited as one of the countries most affected by this change in lifestyle with serious repercussions on the wellbeing of the population and therefore a lot of research has been done in evaluating the costs, issues and repercussions of this societal issue. As an indication, in 2008, for the United States alone, the cost of obesity was estimated at 147 billion US dollars per year (Finkelstein et al. 2009). Since 2008, it should be noted that the numbers have continued to rise and obesity has never been higher, reaching a score of 41.9% of obesity prevalence in 2021, which suggests that the costs assessed earlier should be revised upwards (Chronic Disease Center (NCCDPHP) 2022).

At the individual level, several studies have been conducted to evaluate the annual cost of overweight and obesity to the affected people. Although the figures differ from one study to another and were conducted in United States, it should be noted that the costs are significant in all cases and vary between men and women. It costs an obese woman 4'870 dollars more per year in USA for living than a woman in good shape as for men it represents 2'646 USD more to spent per year (*The Cost of Obesity: a Higher Price for Women—and Not Just in Terms of Health* 2010). The direct medical costs are without surprise the main factor generating these additional costs but not only as for women we can see that the state of obesity generates in addition to medical costs losses related to employment, such as salary losses. (Dor et al. 2010).

Europe is not left behind, the rate of overweight varies from one country to another but the EU average is about 53% (Eurostat 2021). As for the obesity rate, the average is 10%. (OECD,

European Union 2020). Switzerland is no exception and our national statistics on overweight and obesity are in line with those of the EU, 42% of the population is overweight or obese in 2017 in Switzerland (Office fédéral de la statistique 2020). The situation has reached the point that the World Health Organization released an action plan in 2018 entitled: GLOBAL ACTION PLAN ON PHYSICAL ACTIVITY 2018-2030 (GAPPA).

The plan sets the goal of reducing the proportion of physically inactive people worldwide by 15% by 2030. To achieve this goal, the action plan contains 20 concrete actions under four strategic objectives. The actions include a wide range of topics such as the implementation of communication campaigns, the creation of general planning principles, the improvement of the infrastructure for active physical mobility, the provision of offers for specific targets or the strengthening of research efforts (World Health Organization 2019).

## **1.2. Role of fitness in society**

It is in the context described above that the fitness industry comes into play, a private sector turned towards the profit but having an important role of public benefit if one takes into account the impact on the general health of the population that this sector generates. As such, many fitness owners consider themselves to be more of a health promoter than a sports coach or sports facility manager, and rightly so. Indeed, the population mainly the segments living in large urban centers where the population per square meter is important do not often have the space to practice a physical activity at home nor the means to buy individual fitness equipment. Urbanization also plays an important role, as activities such as jogging, often used as the default means of fitness for many people, becomes much less accessible in an environment saturated with obstacles such as city centers where the space to practice is congested with traffic and a greater population congestion on the streets. The supply of sports infrastructure is therefore necessary to maintain the health of the population, which can have access to places specially dedicated to sports activity and designed for this need. This is why the fitness industry is one of the important actors in the reduction of the population's overweight and the maintenance of its well-being. The concern of the actors of the fitness industry should be above all to identify the needs and the motivation of the population in order to bring them to practice a sport activity on the long term and this for two reasons. The first one is financial, to identify the needs of the customers and to acquire more customers and keep them on the long-term maximizing the profit of the company. The second reason is social, encouraging people to practice a sport activity has a positive impact on society because, as we have seen previously, an active person is less likely to develop pathologies and generate negative externalities for society and individuals.



### **1.3. Size of the market**

The Global Wellness Institute (GWI) is a non-profit organization whose mission is to promote wellness around the world by educating individuals about health and wellness. The GWI estimated the global fitness industry economy at \$4.9 trillion in 2019. Following the Covid-19 crisis, by 2020, the industry's numbers have dropped to \$4.4 trillion. Furthermore, GWI forecasts average annual growth of 9.9%, for a result of 7 trillion dollars in 2025. It is therefore a promising and constantly growing market. In other words, there is still room for many newcomers in this industry. (GWI 2022)

In Switzerland, the fitness industry has no less than 750,000 subscribers for a total of 1,000 gyms open throughout the country (Christophe Schenk, Frédéric Boillat, Claudio Zemperini 2017). The offer is abundant, especially in the large Swiss agglomerations such as Geneva where the number of gyms per km<sup>2</sup> is exploding. We can count more than 70 fitness in the Geneva area (*Fitnessadvisor.ch* 2022) and this does not take into account similar sports facilities such as CrossFit or private coaching club.

### **1.4. Problem statement**

Taking into account, the Swiss statistics on the demographics of the fitness customers, it is clear that the target audience of this industry is mainly the generation Y and Z. In fact, people between 15 and 44 years old represent nearly 70% of the Swiss fitness industry's clientele in 2020 (*Sport Suisse 2020 - Activité et consommation sportives de la population suisse* no date, p. 45). In a market saturated by an abundant supply, it is important for gym owners as well as newcomers wishing to enter this industry to find out what are the most important criteria to take into consideration in order to attract customers from Generation Y and/or Z as efficiently as possible in order to develop their business and also keep the clientele from these segments loyal in order to achieve their financial goal and promote a healthy lifestyle toward the society.

### **1.5. Objective and Research Question**

The objective of this research is to provide concrete answers to fitness center owners and newcomers on how to compete effectively in the fitness industry, with a focus on the Geneva area of Switzerland where this study is being conducted, by targeting customers of generation Y and Z. The demand for specific infrastructures from customers, the best communication channels to use and the critical success factors necessary to compete effectively in this sector will be addressed in this study in order to answer to the following question: What are the needs of Generation Y & Z in fitness industry?

## **2. Literature review**

### **2.1. Understanding the generations Y & Z**

#### **2.1.1. Definition of the generations**

Generations as we think of them are derived from the Strauss-Howe generational theory model. Each generation has an average duration of 20 years. Each generation is marked by turning points that have had a major influence on the generation and on the development of their own characteristics. This model of generation has been very often reused in marketing and advertising in the Western world, mainly in America and Western Europe, because it is practical but the dates that define the beginnings and ends of generations vary from one model to another. However, Strauss and Howe define the millennial generation as those born between 1982 and 2004 and Generation Z as those born in 2005 or later (Suzanne Newcombe, Amanda van Eck Duymaer van Twist 2021).

#### **2.1.1. Difference between generation Y and Z**

As explained the generation model comes from sociology but is not adapted to marketing because it does not take into account the rapid evolution of technology and the repercussion on development of specific behavior on the new generation. This is a problem from an analytical point of view because all individuals above the age of 17 in 2022 are classified in the same category. For practical reasons in this work, we will refer to the separation of generations as decided by some marketing researcher and put the separation between generations Y and Z to the year 1996 which will be the last year of birth of the Millennials. To summarize, anyone born between 1981-1996 falls into the Generation Y category and anyone born in 1997 or later is part of Generation Z (Michael Dimock 2019).

Several studies have focused on the already identifiable differences between the first digital natives, namely millennials, and Gen-Z, which represents the second, younger wave of digital natives. It seems that Millennials tend to be idealistic and focus on experiences of all kinds, whereas Zs are more pragmatic and focused on saving money. (Koksal 2019).

This has to be put in perspective with the fact that the individuals who form Generation Z cannot afford to spend a lot of money because most of them are still in study or in the early years of their career and therefore have limited income. It should also be noted that the line between Generation Y and Generation Z is confusing. Studies and models disagree on exactly when the two generations end. It can vary from 1996 to 2004 as we seen before. This makes it difficult to clearly distinguish different behaviors between these two generations. The individuals themselves sometimes do not know which generation they identify with more. It is

indeed very complicated to analyze a generation that is still in the process of development, for example, generation Z was marked by the Covid-19 crisis and the repeated confinements, before 2019 this variable was not part of the turning points marking generation Z whereas now it is taken into account as being an important element that risks having repercussions on the psyche of the individuals of the last two generations Y and Z and indeed on the fitness industry there are already some trend that emerged from this aspect. We can nevertheless note an accentuation of the use of technology among Generation Z, which is even more focused on digital channels than the previous generation and also by its ability to master the use and codes of them. It also seems that due to their more pronounced use of social media, Gen Zers have been exposed to intense stimuli from a very young age. They have developed a better ability to filter online content but are also criticized for their lower attention span due to this overexposure to stimuli's. Therefore, it would be more difficult to target them with outbound strategy actively prospecting them. This would make sense with the recent trend of companies to have a more inbound approach of marketing and especially digital marketing aiming not to be proactive in promotion but rather to attract customers who already have an attraction for the product or service to the company by using inbound strategy.

### **2.1.2. Difference with previous generations**

One of the major turning points for these two generations is the apparition and the fast development of the Internet. These generations are the first generations composed of individuals designated as Digital Natives, that is to say individuals young enough at the time of the massive introduction of consumer computing to have acquired an intuitive mastery of it that generally exceeds that of previous generations (Reilly 2012).

Other socio-cultural aspects also mark a break with previous generations: a more pronounced commitment to social values and the fight against inequality, and a stronger commitment to these values and to brands that endorse them. For example, it is only since generation Y that ecology has become a subject of interest for the general public, whereas this concept was not at all intuitive for previous generations and was not taken into consideration in all aspects of life and by companies in terms of marketing (Turner 2015).

Directly related to health and as mentioned in the introduction of this work the ever-increasing emphasis on a sedentary lifestyle and an industrial diet are not to be forgotten as an important factor marking this generation. Indeed, the previous generations, respectively X and baby boomers, had a less sedentary and more active lifestyle due to a higher proportion of work in the primary and secondary sector and the practice of a physical activity was partly include in the working part of their life.(Martins et al. 2021)

### **2.1.3. The evolution of fitness perception**

Since the 70's fitness has been in constant evolution, we can even talk about a revolution so much its public image and its practice has changed since the beginning of its democratization. Formerly a subculture associated with bodybuilding and the lower classes, its practice is now accepted by all social classes and is part of a lifestyle rather than a sport discipline. Fitness centers exploded around the world in the 1990s and the concept of health clubs with group classes developed (Andreasson, Johansson 2014).

The rise of social networks has contributed to the development of sharing and excitement around the practice of a physical activity, content dealing with the best way to train, nutrition or lifestyle routine to be in shape has become a huge success on social networks and especially on Instagram which is the social networks of choice for Generation Y (Australian Fitness Academy 2018).

YouTube also has been an important factor in the process of “mainstreamization” of the modern fitness by sharing an immeasurable amount of knowledge on the subject. Instagram coupled with YouTube and the many websites on the topic allows anyone, who knows how to search the right information, to have an instant and free access to all the knowledge about fitness practice and to be able to achieve personality goals related to fitness, health, and wellbeing. Generations Y and Z are much more adept at using these platforms than the previous generations, which explains in part why they are more educated about nutrition and sports than their elders.(Sokolova, Kefi 2020).

Influencers are not to be overlooked in this change of vision that the latest generations have towards the physical activity. Indeed, if influencers have influenced anything, it is the industry itself by revitalizing the vision that people had of it and making it fun for the younger generations, especially Gen-Z. (Sokolova, Perez 2020)

### **2.1.4. Generation Z and health**

Generation Z is by far the most active of all generations and the most aware of the overall benefits that physical activity brings to personal growth and stability. This generation for instance is more open on mental illness than the previous one and more likely to talk about it and take action to preserve their mental health (Baral, Prasad, Raghuvamshi 2022).

Physical fitness and mental well-being are more or less indistinguishable from each other for this generation that understand the close connection between a healthy body and a healthy mind as some of the literature review as proven in the past (Van Andel, Austin 1984).

This awareness is due in part to the already established presence for this generation of internet unlimited freely available resources on the internet and the ease with which this generation can find resources on their own but also in a sociocultural shift in the way to look at the health. This is even more important now, after the Covid-19 crisis where many young people noticed the fragility of mental health in a context of social isolation and where the practice of a physical activity at home has been a source of comfort and help to maintain their health mentally and physically (Sarah Marion 2022).

### **2.1.5. Motivation factors for physical activities for young people**

The motivational factors that lead an individual to practice a physical activity or a sport are a subject of study that has been explored many times in the scientific literature on health and psychology (Bollók et al. 2011; Cortés et al. 2017).

One of the things that is often confused in the common dialogue about sport and physical activity is that the two are lumped together in one category. However, the motivations that lead an individual to participate in a sport, whether it is an individual sport such as tennis or a team sport such as football, are very different from the practice of fitness or an activity aimed solely at getting in shape or improving physical abilities (running, cycling, etc.). This being said, the literature shows that motivations vary according to both the type of activity and gender. The practice of a sport for men will be for the competition, the challenge and the enjoyment of it. As far as women are concerned, the practice of a sport is synonymous with belonging to a group, pleasure and challenge too, but competition is less important. Regarding physical activity, men have a higher level of motivation for challenge, competition, social recognition, strength and endurance while women are more focused on the aspect of physical activity that allows them to lose weight and the appearance (Kilpatrick, Hebert, Bartholomew 2003).

These differences in perception between the sexes, are subject to debate because it is probable that this includes a part of socio-cultural in the vision that young individuals have of the practice a physical activity, this study has been realized in a western society country. Nevertheless, the results expected by the practice of physical activity, respectively weight management for women and creation of strength for men is a tendency not to ignore during the creation of promotional content aimed at encouraging individuals to participate in physical activities and should be considered for marketing purposes. In addition to intrapersonal motivational factors, it would appear that external environmental factors also influence whether or not people participate in physical activity. For example, the proximity of infrastructure and accessibility is important and have a role of the level of physical activity of a population (Raynor, Coleman, Epstein 1998; Reimers et al. 2014).

The important thing to remember from this study is that there are two distinct profiles of sport/physical activity participants. A pure physical activity does not call upon the same motivational factors as the practice of a sport, which suggests that people interested in a sport may not be interested in a physical activity or vice-versa. This difference in initial motivation can be exploited to find ways to intelligently promote physical activity in the form of sport and this will be developed later during this work.

## **2.2. Fitness industry**

### **2.2.1. Best practices for fitness center business & sustainability**

The fitness sector is a complex industry, but it has a lot of studies on multiple aspects related to it. For example, the profile of fitness center clients has been explored from multiple perspectives, including the quality of services, the effects on their satisfaction, their perception of the quality of these services, as well as their loyalty to fitness centers. The different factors previously mentioned have been correlated with the stability of the company not only with regard to the loyalty of the members towards their fitness but also on the solvency on the long term the business, thus these factor have to be taken into consideration (León-Quismondo, García-Unanue, Burillo 2020; Alexandris et al. 2004).

Based on these studies, the following factors are the most likely to make a fitness facility sustainable over time and build customer loyalty: Firstly, the quality of the human relationship from the staff at the reception to the instructor towards the clients has an extremely important impact on the intrapersonal level and on the motivation that a client may have to come back to a fitness center, especially in these first months.

Secondly, more than the variety of services offered such as machines and training areas, the cleanliness and maintenance of the equipment provided is important, especially with regard to the locker rooms. Surprisingly, the cleanliness of the locker rooms is of particular importance, perhaps more so than a big area available to train. In third place, it would appear that group classes are particularly important in creating customer engagement. Fitness managers agree that this plays an important role in creating engagement and bonding with their clientele.

Finally, the price and the conditions associated with it and the proximity are also important aspects. Indeed, as far as price and conditions are concerned, flexible contracts with the possibility of cancelling at any time or a good combination of subscriptions over several months should be put in place. Regarding location, fitness centers should be considered as local businesses whose members are not willing to travel more than 15 minutes to get there. (León-Quismondo, García-Unanue, Burillo 2020).

It should be noted that these factors are not necessarily the criteria sought by customers when they want to subscribe to a fitness club but the elements that have proven effective in the past to acquire and retain customers by the managers of different fitness centers.

### **2.2.2. The case of group fitness and CrossFit**

CrossFit is a separate entity in the fitness world. Originally a training method with functional training at its core, it has evolved into a sport and has also become a licensed brand. Although it is a training method and its practice can very well be applied to an individual training, it is taught and practiced by small to medium group class in CrossFit gyms called “boxes”. For a decade now, it has become one of the biggest brands of Fitness around the world with more than 10'000 affiliates clubs and an annual revenue of no less than 4 billion dollars. It is a fitness practice that has mainly marked millennials, the majority of people who practice it are between 25 and 34 years old. Demographically speaking, it is also an interesting practice because of its perfect distribution between the sexes in the proportion of participants, i.e. 50% men / 50% women (Bojana Galic 2022).

CrossFit is often at the heart of controversy in the industry because of the way it is taught and practiced by some people. For instance, health and fitness professionals judge some movements of weightlifting and gymnastics dangerous for the beginners' practitioners if badly taught and if carried out with high intensity (what is unfortunately often the case in CrossFit). Furthermore, the CrossFit community is often pointed out as being a cult-like community where members feeling a great sense of loyalty for their practice and the club they belong, they are easily offended by the criticisms that are addressed to the defaults of the practice itself, try to convert their entourage to participate, etc.

However, despite the detractors, the CrossFit success is undeniable and its growth has remained constant for over more than a decade. These aspects related to the loyalty of the practitioners and the growth of this practice is the main object of this section, the positive effects or not on the health of this method of training compared to the so-called traditional forms of training is another concern which will not be developed in this work.

Studies have been carried out on the subject and have shown that customer commitment was linked to loyalty and we have seen that within the framework of the classic fitness industry these variables were correlated with the sustainability of the business (León-Quismondo, García-Unanue, Burillo 2020; García-Fernández et al. 2020). From there, CrossFit has tremendous power to engage its customer base. It is undeniable that retention and growth of its customer base is one of the strengths of the CrossFit model, which has one of the most tightly knit community in the sports world. This can be explained by several factors.

We saw that the perception and motivation of practicing a sport was not the same as the practice of a physical activity and do not appeal to the same motivational factors and goals (Kilpatrick, Hebert, Bartholomew 2003).

CrossFit is a physical activity practiced in a competitive and sportive approach. Thus, its practice appeals as much to motivational factors related to physical activity (i.e. being healthy, improving one's appearance, gaining strength and losing weight) as to motivational factors related to the practice of a sport (i.e. the feeling of affiliation to a group, competition, fun and challenge). This finding suggests a strong attraction for users who theoretically have all the advantages of both types of practices in one.

Moreover, other studies have been conducted not on CrossFit but on group classes, it has been shown that participation in regular group fitness classes resulted in a statistically significant decrease in perceived stress and an increase in physical, mental, and emotional quality of life compared to regular individual exercise or no regular exercise. Participation in weekly group fitness classes may be a solution for improving emotional well-being and stress levels which is exactly what the new generation seek for in the practice of a physical activity.(Yorks, Frothingham, Schuenke 2017).

Traditional group classes, by which we mean those affiliated with licenses and taught in most of the local market (LesMills, TRX) are mostly occupied by women and few men, there are many reasons for this. Firstly, this course is mostly center on an aerobic form of training as being classes rather related to weight loss, men are less sensitive to this and prefer activities with a focus on muscle resistance or strength as well as competition. Functional training including all the aspect of fitness, muscle resistance and cardio-vascular activity and is therefore attractive to both sexes and for the achievement of several goals from weight loss to muscle mass gain.

To summarize, group activity has a very important power of commitment and loyalty, it can be used in an intelligent way in different forms in order to bring a profile of users who desire this social dimension in the practice of their physical activity, whether it is by competition or by need of belonging to a group. CrossFit is an example of a business model that has made this form of group fitness the core of its model and this with success.



### **3. Research Method**

Firstly, in order to carry out this research, a survey was created to ask fitness users in the desired age range (16 - 45 years old) about their demands in terms of expectations/services and also what they are most likely to value in the promotion of a fitness facilities. They were free to share their personal opinions about the current industry and what should be improved.

Secondly, to have a clearer vision of this industry on the local market, two interviews were conducted with two professionals who each have a different job in the fitness industry and a several years of experience. The first interview conducted was with a manager of an independent gym facility and the second one with a private coach active on social networks. Both interviews were conducted in a semi-structured way. The role of the interviews was to get the opinion of experts on the current market as well as to collect feedback from customers they had faced during their career.

Furthermore, the literature review on the fitness industry previously presented in this work will be used to see if the data collected make sense with what has already been observed in past studies. The research method aims to cross quantitative and qualitative data in order to draw conclusions between the results of the survey, the interviews and different lines of thought suggested by the literature review in order to identify the most important aspects to take in consideration in order to attract people from generations Y and Z to a fitness center.

## **4. Results**

### **4.1. Preamble**

It should be noted that both the survey and the interviews conducted for this study were done in French for the convenience of the target audience in the local scale of the Geneva area. Therefore, the transcriptions of the survey questions and the answers try to be as faithful as possible to the original meaning after translation from French to English.

### **4.2. Survey on fitness participation**

The respondents of the survey are mainly students from the Haute Ecole de Gestion and the University of Geneva who agreed to participate voluntarily to the survey. 111 responses to the survey were record after data cleaning. Based on these answers two reports were created with male and female results in order to segment the respondents and see if there are any significant different between gender. Below is the summary of the results to base on the reports.

#### **Demography of the respondents**

The proportions of men and women are defined as follows: 46 responses from men (~41%) and 65 responses from women (~59%). The average age of the participants is around 23 - 24 years old. The majority of respondents were currently studying for a bachelor's or master's degree at university or the HEG of Geneva. The young people under the age of 24 have an average annual income between CHF 10,000 and CHF 19,999 while older people have an average annual income between CHF 20,000 - CHF 29,000.

#### **Experiences in fitness practice**

Almost 50% of the participants have 2 years of experience or more of practicing physical activity in fitness center. The average is 2.08 years of training in the survey population. Men's average is higher than women's with many respondents having 3 or more years of training. Also ages are correlated with the number of years of practice: older people have more years of training experience on average. Almost half of the participants indicated that they had only joined one fitness club. 70% of all participants had not joined more than 2 clubs in their lifetime at this time. These percentages do not vary greatly between genders and the distribution remains homogeneous.

### **What fitness club are the respondents enrolled in**

The majority of the people questioned are registered with one of the big fitness chains present in French-speaking Switzerland such as Activ Fitness (21.98% of the respondents), Let's Go Fitness (17.98% of the respondents) and Non-Stop Gym (16.85% of the respondents). Also, a considerable proportion of people belonging to CrossFit clubs (12.36% of the respondents). The rest of the responses are spread over several minor or local fitness center of the region.

It was also requested to estimate the annual subscription price paid by the users. The average price paid by users is around CHF 836.02. This average is higher for the women: CHF981.56. The men average is about CHF 790.10.

This is one of the few variables where we can see a difference between the ages. Indeed, the youngest (less than 24 years old) are mostly affiliated to centers considered as low-cost on the local market.

Additionally, to that, a question was asked for an estimate of the annual subscription price that the respondent was willing to pay for an annual subscription to a fitness facility. The average price that users are willing to pay per year is CHF 985.33. The difference between men and women is marginal.

### **Motivation to do fitness?**

Participants were able to select several reasons that they considered to be fundamental reasons for what they participate in physical activity.

The answers to this question vary between the sexes, with women more often mentioning weight loss as a reason for doing fitness. Women also mention a little more than men the reason related to energy and mood and thus to the mental aspect of physical activity, while men put the factor related to self-confidence and appearance as the first reason.

Male respondents also put more emphasis on specific objectives such as strength gain, explosive work but also the social and competitive aspect of physical activity.

70% of men practice another sport/physical activity in addition to fitness compared to 50% of women. Running is often cited as an occasional activity by both sexes. The practice of team sports was the most common activity for men, who often mentioned fitness as a complement to improve their performance in their respective sport.

The participants who answered that they did not currently practice fitness in a gym were also asked what were the factors that dissuaded them from doing so. There are three main reasons that respondents said: Time, money, and the ambiance of the center (the people mainly). The lack of assistance was also mentioned.

### **The most important criteria when people choosing a club**

Participants could judge items on a grading scale between 0 and 5. Variables with a mean score of 2.5 or less were considered to be of low value.

The criteria for selecting an infrastructure did not vary with age, but there were notable gender differences. One variable, however, stands out and is consistently cited as a priority by both men and women: proximity or, more precisely, distance from home. This is a variable that has a considerable gap with all the others in its gradation of importance by the responses of the respondents. The second most important variable for men is the free weight zone, while women judge the atmosphere of the gym as the second most important variable. The price of the fitness facility is cited consistently between men and women as the 3rd most important variable. Men and women also place a high value on space during busy times and 24-hour access. Functional training areas are valued equally by men and women. The cardio areas attract more women than men, although the free weight areas are still prioritized by women and highly valued by men. Women value the attitude of the staff more than men, as well as group classes and individual coaching to some extent. Men value some variables that women also value but to a lesser extent. This is the case for the attitude of the staff and the atmosphere in the gym. However, group classes are not valued at all by men. Individual coaching, personalized programs and relaxation areas are not valued by men or women.

Respondents were also asked if other criteria were important to them: some themes are frequently mentioned by both men and women. The machines available in addition to the classic areas, the cleanliness of the facility, its maintenance and the brightness, the attitude of the members who frequent the club: professional and other users

As for the opinion on the promotion of a fitness facility, respondents were asked what criteria should be taken into account in order to be competitive in the industry. Both men and women agree that the website is the most important factor to consider in order to be competitive with the promotion of a fitness. Women mention a little more than men a presence on social networks to be competitive.

Mobile applications are not at all considered important by all respondents, nor is the technology embedded in the fitness facilities available in the gyms such as connected devices.

### **4.3. Interview with professionals of the fitness industry**

Two interviews were conducted in order to collect information on the perception of the industry by professional actors on a local scale, i.e. in the Geneva region. The interviews were conducted with a semi-structured approach leaving room for open-ended questions where the interviewers could speak freely. The idea of these interviews was to seek in-depth information

from the experience of industry professionals and to see how well this makes sense with the survey results and the literature on the subject as well as best practice observed. The main themes and the professionals' responses to them will be presented in the following section. The complete transcript is available in the appendix.

#### **4.3.1. Interview 1: Gym owner**

The first interviewer is 59 years old; he has owned an independent fitness club for 18 years which he acquired in 2004. He has been practicing bodybuilding for these 14 years (45 years of experience). He is specialized in weight training and physical conditioning as well. He is currently working on the opening of a second gym that will open in 2023, he has experience in the industry and successful variables to sustain a business. His gym has a strong focus on the bodybuilding aspect.

##### **Demographics of the customers of his fitness club**

No particular strata of the population in terms of age. The average age is around 30 years old with many customers who have been coming for a long time and who are loyal to the company for several years, no particular social class identified at the financial levels. 70% of men / 30% of women come to train in his gym. The average client comes to train 2 to 3 times a week.

##### **Gender differences in motivation to practice a physical activity**

Men are more attracted to a form of workout that emphasizes muscle growth and strength while women are more attracted to weight loss. Women are sometimes afraid of an athletic approach that is correlated with a masculine approach to sports, but they are finding that more and more women are breaking free from this gendered view.

##### **Generation differences in the practice of physical activity and demand of services**

No different demand observed between generations. The objectives between the ages remain generally the same, weight loss, muscle gain, getting back in shape after a period of prolonged inactivity.

##### **Difference between his club and the competition?**

Club with a strong focus on bodybuilding in its marketing positioning and its facilities. Contrary to the generic chains his fitness has a big focus on the facility allowing the work in muscular resistance and not in cardio vascular. The philosophy of the club is that people come to his club to "really train".

### **Customer loyalty of the customer to his club**

About 70% of the club's members renew their membership every year. He considers his clientele to be extremely loyal, with members who were there even before he took over the establishment, some of them over 18 years old. However, in his experience, fitness chains are on average below his percentage with a renewal rate of only 30-40%.

### **Opinion on business model focused on the group course**

It is an expensive model in its implementation because it often exploits licenses and instructors that must be paid, it can be at a loss for some infrastructures that are not focused on this. He himself has abandoned this model for some time. The classes and other forms of group fitness bring in people who are to be distinguished from the classic audience that wants to train alone because it does not appeal to the same objectives and the same motivations.

### **Important criteria in fitness industry to be competitive**

Accessibility was mentioned as one of the most important variables at the temporal and dimensional levels. Customer service is considered a sensitive variable that can lead to customer loss.

### **Trend in the industry to take into consideration**

Flexible hours such as 24-hour operation were identified as extremely important. Its implementation has led to a significant increase in club attendance.

### **Important of social network in fitness industry and marketing digital**

The use of Facebook Ad has proven to be very effective in attracting new members and is used regularly.

### **4.3.2. Interview 2: Private coach / Social media influencer**

The second interviewer is a 23-year-old independent personal trainer, she is present on social networks and also gives group classes for a fitness center. She has a page on the social network Instagram followed by more than 10'900 people at the time of the interview as well as a website in her name. She regularly shares content about sports and nutrition. She is also an amateur athlete and competes in sports on an occasional basis, particularly in weightlifting. She lists herself on her Instagram page as a professional specializing in weight loss and fitness. She also does remote physical programming (online), which means monitoring and programming training of clients remotely via regular exchange but without physical presence.

#### **Demographics of the customers of her coaching and courses**

Two-thirds women and one-third men use its online and in-person coaching services. The majority of clients are under 30 years old, but the age of clients can range from 14 to 70.

#### **Gender differences in motivation to train**

Many women come to train for weight loss reasons. She notes that mentalities may be changing in the way women view muscle mass gain, but there is clearly a distinction between the sexes in the perception of muscular resistance work

#### **Generation differences in the practice of fitness and demand of services**

Minor differences were noted in the intensity of training desired between generations in that younger people wanted more dynamic approaches to training while older people wanted a fitness approach and not necessarily a performance one.

#### **Customer loyalty to a fitness club**

She reports that in her experience customer loyalty to a brand is linked to the staff working there. She indicates that group classes can be useful if well implemented but that the variable of loyalty is above all the attitude of the staff and the ambiance that can be created.

#### **Opinion on business model focused on the group course**

She thinks it is an interesting model in its ability to create engagement between participants citing CrossFit primarily for which she has experience. She also states that the participants in her own functional training classes have a great social bond with each other, cohesion and commitment.

### **Importance criteria to be competitive in fitness industry**

She indicates that distance is an important variable but that this can be offset in her experience by a particularly good atmosphere from a facility. She indicates that a club should have a layout that takes into account the need of the new generations to post what they are doing on social networks, care should be taken on the aesthetics of the place.

### **Trend in the industry to take into consideration**

The functional area layout is a trend that every fitness company should consider. She believes that the market trend of unstaffed gyms is not necessarily a good idea to attract a general public.

### **Important of social network in fitness industry and marketing digital**

As part of her practice as a freelancer, social media, especially Instagram is extremely important, she considers almost all of her current clientele to be acquired from it.



## **5. Discussion**

The results obtained during this study through survey and interview data collection coupled with the available scientific literature allow us to identify clear tendency in the behavior of users and potential user of fitness facility when deciding to join one fitness center rather than another for the demographics classes concerned. Furthermore, it is possible to draw several guidelines to consider to have a sustainable business.

### **5.1. Discussion on the survey and interview result**

We have to acknowledge that according to the classification of generations in the first part of this study, the majority of the respondents belong to Generation Z. This being said, and based on the different information gathered on the subject, the difference in need and demand between generation Y and Z is marginal and the author of this work does not believe that this would have had an impact on the average value of the responses. Segment ratios by age were created between generations Y and Z but no significantly divergent values were recorded.

Generation Z tend to focus on the low-cost centers more than Generation Y. This search for inexpensive facilities is probably related to the socio-economic status of younger individuals who are mostly still in study or in the early years of their career, but also to a more thoughtful mentality than previous generations when it comes to saving money, as some studies on this generation suggest (Wood 2013). However, it should be noted that in the Swiss market, low-cost quality has only been developed a few years ago and that there is a real demand from people with limited income in urban centers. The local market shows several examples of brands adopting this positioning that have had a significant development in recent years. Apart from that, the demand for infrastructure does not seem to vary specifically between generations and are confirm by the interviewees.

The differences in perception between the sexes, however, are quite noticeable and offer interesting marketing insights into how promotional messages should be directed. Men tended to focus more than women on the facility itself and the equipment available in it. This is also put into perspective by the fact that the male respondents to the surveys were mostly more experienced on average or practiced, for some, fitness as a complement to another sport activity, thus looking for more developed facilities. For women, this would be linked to the social aspect and the ambiance of the environment in general. The environment would be judged more by its pleasantness than by its simple functionality.

The interviewees indicated that the staff aspect was of primary importance to them and that it contributed strongly to long-term adherence in the same way as participation frequency of the

fitness center by the customers. Social networks alone seem to be responsible for the local advertising of a sports club and have an extremely important power.

## **5.2. Conclusion on the data collected and literature review**

The demand for infrastructure in terms of pure equipment does not vary by generation, it should be noted that generation Y and Z represent the majority of fitness users and therefore their demand represents the general market demand. Trends in specific equipment are not so much the important point to consider. A facility with basic equipment for training can be quite attractive when other environmental and social variables are taken into consideration such as staff attitude and hygiene. CrossFit has shown that a business model based on the social aspect in spite of a rudimentary infrastructure could have interest knowing that most CrossFit do not have any premium services and people who frequent CrossFit club are willing to pay more than an average fitness club.

A low-cost model can work without offering services emphasizing the social aspect, the population being in demand of infrastructure allowing to exercise in the urban area there will always have a demand for it. The concept of low-cost fitness has been implemented very recently in Switzerland and mainly by Non-Stop Gym which opened its doors in 2014 and has since exploded with more than twenty clubs opened throughout French-speaking Switzerland (*Success story : NonStop Gym 2021*). It seems that before this, fitness clubs were positioned more as a luxury service and many clubs have inherited this positioning. However, the majority of the premium services offered in these centers are not the main desire of the younger generation and prefer to pay less for only have the essential: a functional facility for training.

However even if the price is important and will determine the social class that will come in the facility, an infrastructure that would create an additional social dimension would have a definite competitive advantage over its generic competitors and be more sustainable on time.

There is a kind of retention dilemma: A facility can be profitable without customer retention on the assumption that almost half of its members will be inactive after a short period of time and pay in a vacuum due to the contract condition for a yearly subscription but this would be at the expense of the customer and in an effort to improve the well-being of the population, this is ineffective or at least sub-optimal. With a good location and a low price, there will always be a customer base in the area willing to come into the facility if it is well maintained... but for how long before losing motivation to train?

It would seem that the supply of infrastructure on the current market is already well filled. However, regardless of the infrastructure, the participation and motivation of the members seems to fade rapidly over time in the actual market. There is a missing dimension that allows

users to participate more often in physical activity and to remain motivated in the medium-long term and the research during the elaboration of this work as well as the literature on the subject indicate us that it is above all the social aspect of a fitness center that will have influence on this, whether it is the attitude of the staff, the group activities or the spaces dedicated to the socialization within the center, this should be an essential part of any club

### **5.3. Recommendations**

#### **5.3.1. Proximity and accessibility**

Proximity and accessibility remain the most important factor, regardless of generation. It should be noted that the participation in a physical activity of a population will result mainly from this variable as some studies suggest us (Reimers et al. 2014; Rebecca Allen, Craig M. Ross 2013). A local market and urbanization analysis should be conducted to identify the most underserved areas in order to maximize the impact of a new infrastructure with a rule of thumb of 10–15-minute max to access to the facility.

#### **5.3.2. Price**

Price is a variable to consider if the subscription exceeds the local market average as it will require a greater emphasis on differentiation through added services or a unique value proposition (MacIntosh, Doherty 2007). As far as Switzerland is concerned, the average is more or less CHF 1'000 per year. However, if the goal is to attract a young audience, it is advisable to focus on a low-cost model with a subscription not exceeding CHF 59.00 per month if we stick to the current local market.

#### **5.3.3. Staff participation**

Furthermore, the social variable, although often not taken into account by the users and by the fitness centers themselves, remains the most important variable after the geographical position of the center. Maximizing this variable alone can create a loyal community and sustain a facility regardless of the service proposition and associated facility-specific positioning. Encouraging proactive employee involvement with users, analyzing the locations and times of day where there is the most traffic, and then having a more qualified staff with better communication skills at those times and rigor, joins the literature on the subject (León-Quismondo, García-Unanue, Burillo 2020; García-Fernández et al. 2020). A focus on the social skills of the staff and their ability to create member engagement should be a priority when selecting member for any facility

### **5.3.4. Group activities**

Group fitness programs attract client profiles that find it more difficult to engage in physical activity on their own. Group classes in the form of licenses as traditionally taught in fitness centers (LesMills for example) seem to be losing their relevance with the new generations and are expensive to implement. Other forms of classes such as functional training class, which by the analysis of CrossFit case seems to appeals to both men and women, should be considered in order to create community engagement and increase motivation to participate in physical activity for members. The strong potential for commitment and social bonding that small group classes and social activities can bring for a fitness center and his members should take in consideration in the service proposal that a club establishes and are to be related to the variable related to the staff behavior described above.

### **5.3.5. Promotion**

The use of social networks such as Instagram for promotion is highly recommended. This is a communication channel with a huge impact on the target audience, namely the young people of generation Y & Z, and it is inexpensive to implement. Using personalities that the target audience can identify with or users of the infrastructure who can help promote the services by sharing their experience is highly recommended. This also helps to show future users which target audience is using the infrastructure and therefore attract new users who identify with the audience. Note that this identification with the target audience is even more effective with women. Women being more sensitive to social proof however it is advisable in order to best attract this segment to do a targeted promotion highlighting this segment by using women professional or highlighting women users of the current installation.

#### **5.3.1. Additional services**

SPA/Hamman services and technology such mobile application and connected equipment are not the priority of the customers and serve as differentiation for specific customers that look for premium services but not appeal to the general population and should be not taken too much in consideration with a focus on the training zone area. This kind of additional services is correlated with higher subscription cost and premium center which is more appealing for wealthy social class who are often more mature and belong to older generations.

#### **5.3.2. Other aspects to consider**

Also mentioned by some survey participants and present in the literature on the subject, the hygiene and maintenance of a club is considered extremely important and regular supervision should be instituted to keep the environment as clean as possible (MacIntosh, Doherty 200),

the local market seems to be relatively in order on this point, the hygiene standards of Switzerland being well regulated.

#### **5.4. Limitations of this research and possible questions for future researches**

The survey results are consistent with observations already made in the scientific literature on the fitness industry. However, studies should be conducted on a larger segment of the population with a clear distinction between Generation Y and Generation Z individuals to be sure that no significant differences are visible between them. The literature suggests, however, that there is no influence in the motivations and ways of training among individuals under the age of 45.

More interviews could have been conducted with other professionals, but the results seem to indicate that the respondents put forward the same success variables as those observed in the best practice and other studies on the industry.

The current work not addressed the need of some niche segment user such as older users. Studies should be undertaken on the older generation X and especially Baby-Boomers, in order to find out what their needs are, as a classic form of training and infrastructure may not be the most suitable for this niche segment.

The health of these people should not be ignored, taking into consideration that inactivity from an advanced age generates more easily pathologies and important health risks for the individuals concerned. An adapted level of activity could be the key to avoid this (Toraman, Yildirim 2010).

On the marketing part, the SEO of the website of a fitness facility on search engines has not been the subject of extending research within the framework of this work, it should however be noted that the online presence is a factor of great importance a search through the Internet having become the norm for the majority of the population wanting to acquire information on a product or a desired service. Studies could however be conducted to calculate the impact of the internet referencing of a newly established fitness center on its ability to attract new customers and compete with already established competitors.

## 6. Conclusion

This report was realized with the objective of identifying the needs of generations Y and Z in terms of fitness infrastructures and to see how this can be useful in a marketing approach but also in an approach of promotion of the physical activity to the segments of the population concerned. As a result, Generation Y and especially Generation Z that represent 80% of the fitness users have a more holistic approach to practice fitness and a pragmatical approach to choose a fitness center mainly linked to convenience and accessibility.

The geolocation of the club and its accessibility from a physical point of view (connectivity to public transportation, proximity to the users' homes, parking space) and temporal point of view (opening hours and days) is the essential variables that must be addressed before any other proposal of services aiming at differentiation.

It was shown that variables even ignored by the customers themselves in a conscious way could have a great influence on their loyalty in the long term and that in this context the fitness industry should be primarily perceived by these environmental and social variables rather than on the service dimension linked to the equipment itself. The younger generations seem to be less sensitive to the presence of staff in the facility but remain sensitive to the ambiance and the creation of links with the members of a club and the feeling of belonging to it. The best practice and our research indicate that the staff remain the most powerful variable too use to address this purpose. Building relationships and commitments with users that lead to customer loyalty is associated with the sustainability of a fitness center and should be given greater consideration in the development of any business model for the sector.

Differences in the perception and motivations to practice fitness between gender has been identified. It should be noted that in a marketing approach, women will be more sensitive to promotional marketing messages highlighting weight related issue and health when men are more concerned about muscle gain and self-accomplishment. However, the ways of training tend to become homogeneous between the gender and so the equipment and the facility, to achieve these different objectives, are similar. Functional & muscular resistance training zone should be the focus over cardio area, because of their relevance in the contemporary way of practicing a physical activity. The use of social networks such as Facebook and Instagram are highly recommended in this industry to promote any facility to new customers of the segment mentioned.

To conclude, the fitness industry is above all a service industry and social aspect are essential. It would seem that the variable least dealt with by the current actors of the market, due to its impossibility of being produced in a standardized manner and in the long term is the social

variable. Sport in general is all about community and investing resources to build this in any club is a way to increase people participation frequency and in another extends to push people to see a daily activity as more than just a routine to do but an occasion to create bond and share with other people.

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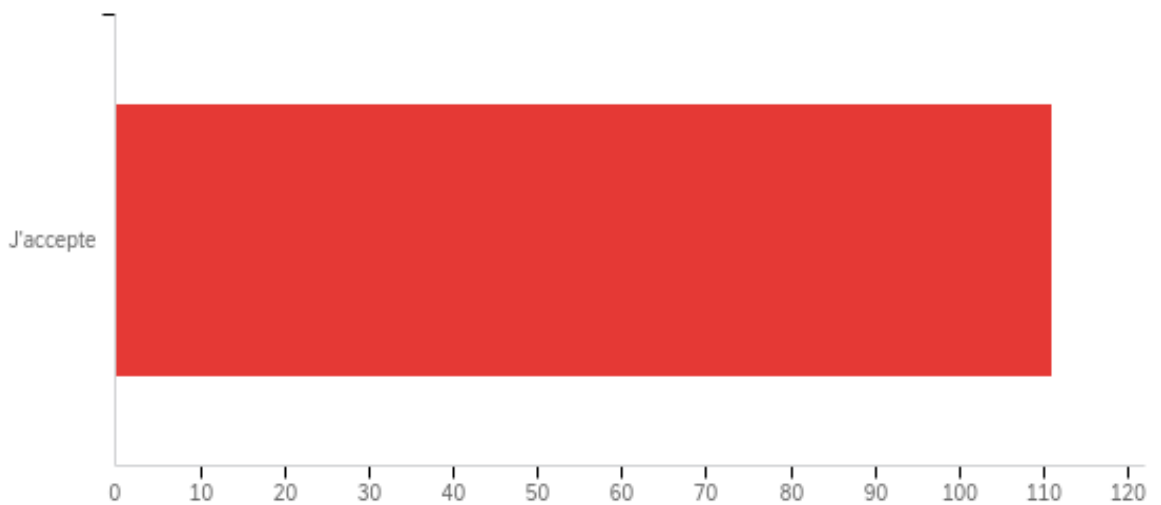
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# Appendix 1: General report on physical activity participation in a fitness center

## General Report

BT\_Fitness\_Industry\_Survey

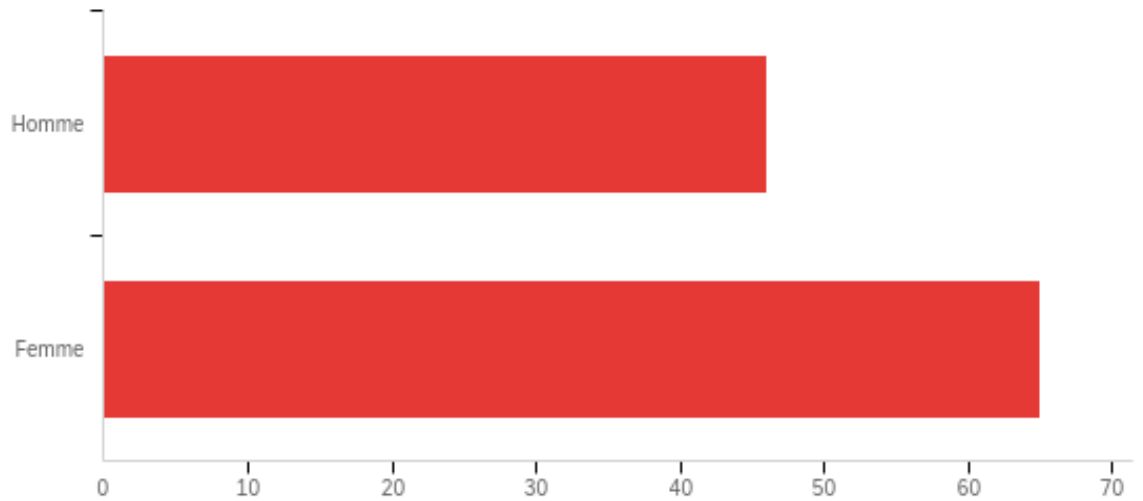
Intro - Bonjour,Je vous remercie par avance pour le temps que vous m'accordez dans le cadre de ce sondage&nb



#	Field	Minimum	Maximum	Mean	Std Deviation	Variance	Count
1	Bonjour,Je vous remercie par avance pour le temps que vous m'accordez dans le cadre de ce sondage&nb	1.00	1.00	1.00	0.00	0.00	111

#	Answer	%	Count
1	J'accepte	100.00%	111
	Total	100%	111

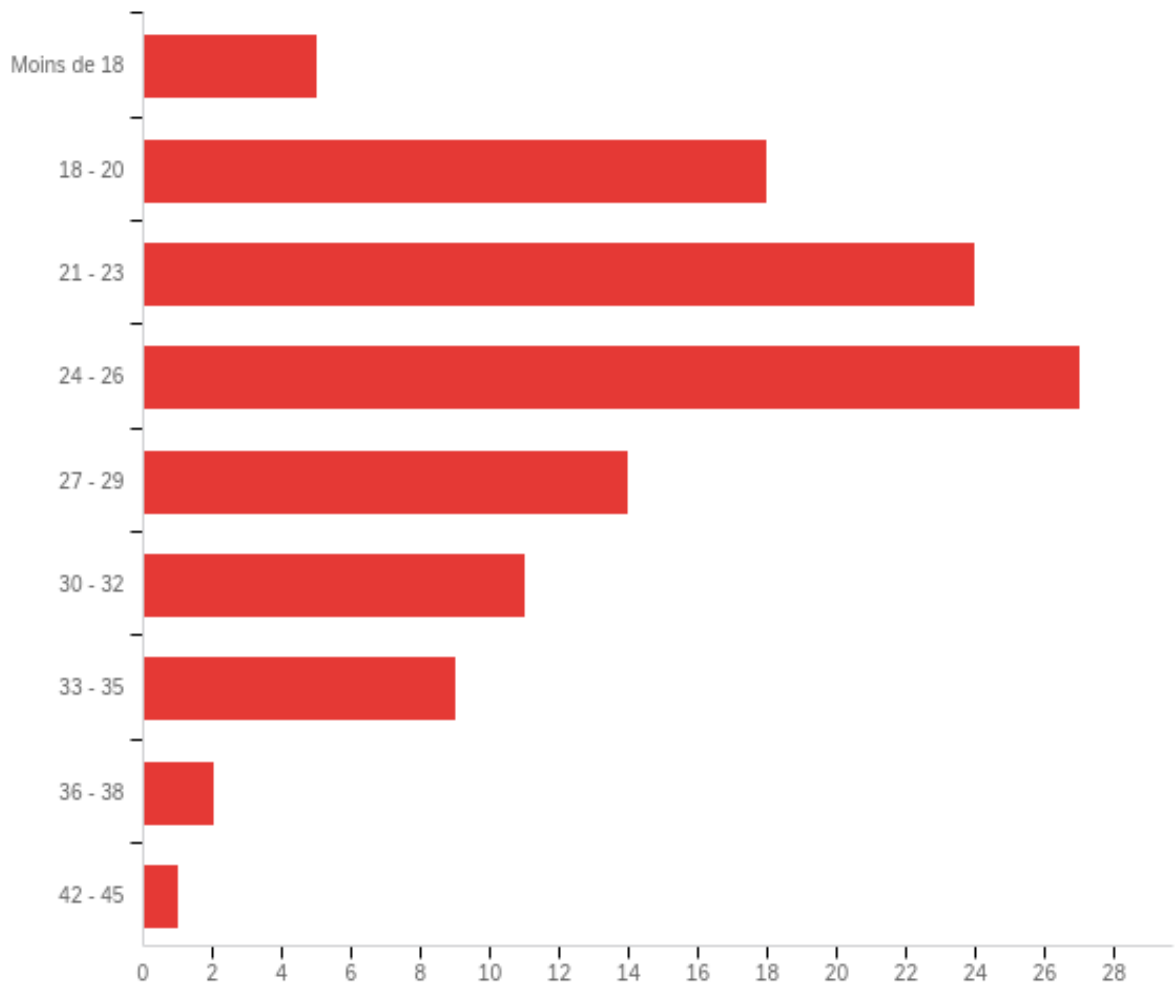
Q1 - Tu es un/une...



#	Field	Minimum	Maximum	Mean	Std Deviation	Variance	Count
1	Tu es un/une...	1.00	2.00	1.59	0.49	0.24	111

#	Answer	%	Count
1	Homme	41.44%	46
2	Femme	58.56%	65
	Total	100%	111

## Q2 - Quel âge as-tu ?

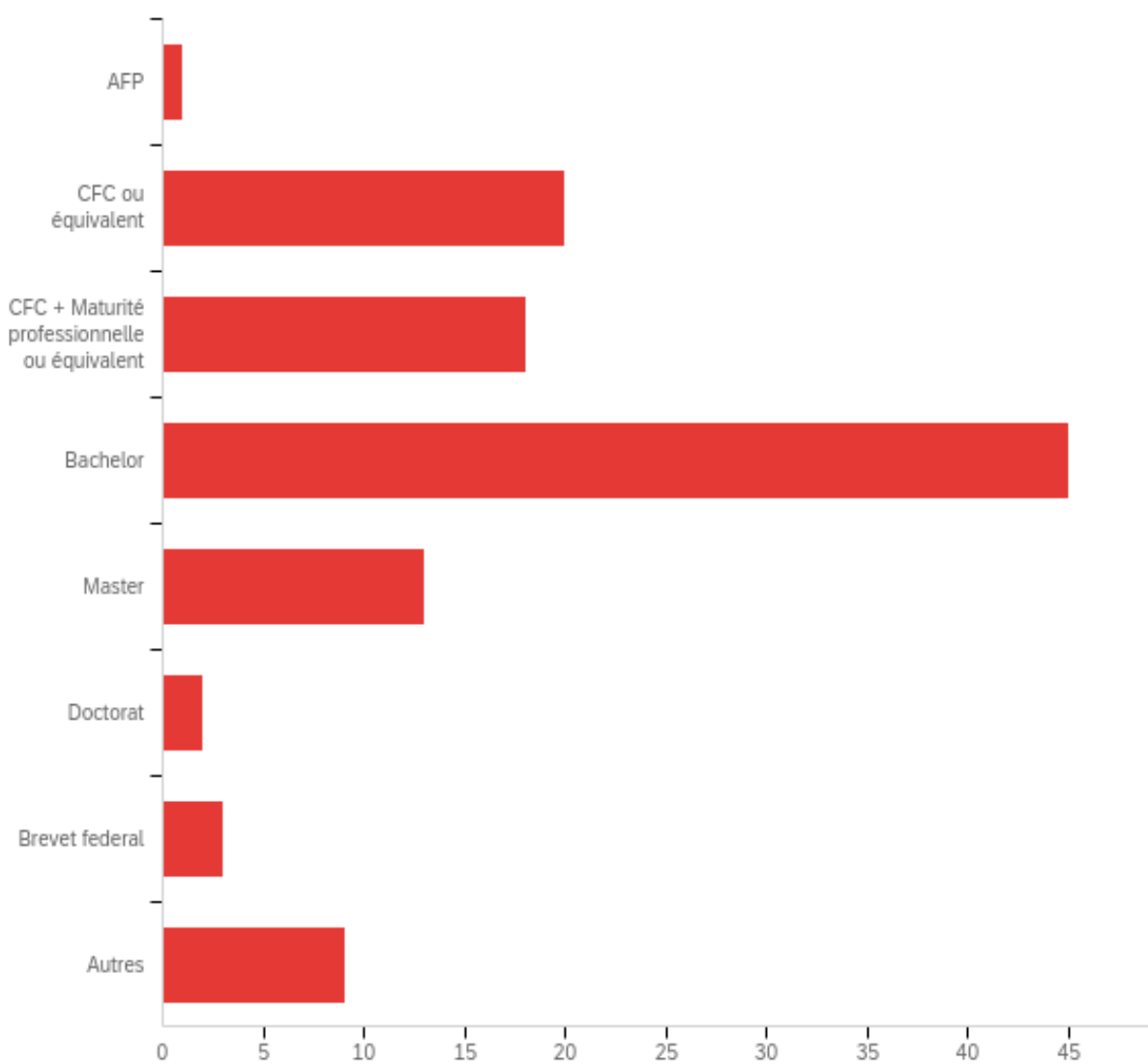


#	Field	Minimum	Maximum	Mean	Std Deviation	Variance	Count
1	Quel âge as-tu ?	1.00	10.00	4.02	1.77	3.13	111

#	Answer	%	Count
1	Moins de 18	4.50%	5
2	18 - 20	16.22%	18
3	21 - 23	21.62%	24

4	24 - 26	24.32%	27
5	27 - 29	12.61%	14
6	30 - 32	9.91%	11
7	33 - 35	8.11%	9
8	36 - 38	1.80%	2
9	42 - 45	0.90%	1
	Total	100%	111

Q3 - Quel est votre niveau d'étude ?





#	Field	Minimum	Maximum	Mean	Std Deviation	Variance	Count
1	Quel est votre niveau d'étude ? - Selected Choice	1.00	8.00	4.01	1.64	2.69	111

#	Answer	%	Count
1	AFP	0.90%	1
2	CFC ou équivalent	18.02%	20
3	CFC + Maturité professionnelle ou équivalent	16.22%	18
4	Bachelor	40.54%	45
5	Master	11.71%	13
6	Doctorat	1.80%	2
7	Brevet federal	2.70%	3
8	Autres	8.11%	9
	Total	100%	111

### Q3\_8\_TEXT - Autres

Autres - Texte

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En étude

---

En cours de bachelor

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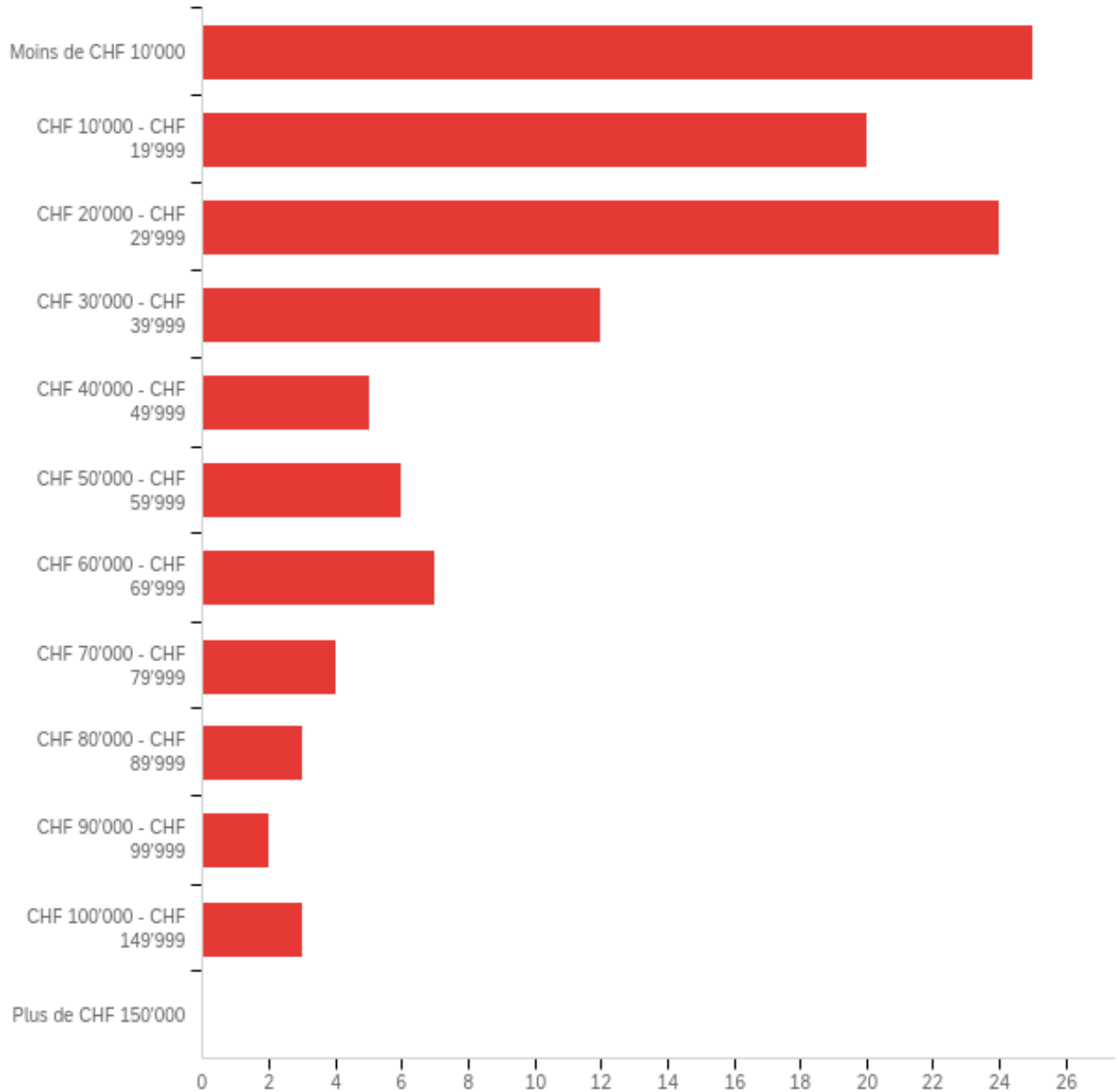
En cours d'étude

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en cours de bachelor

Actuellement en étude supérieure ES

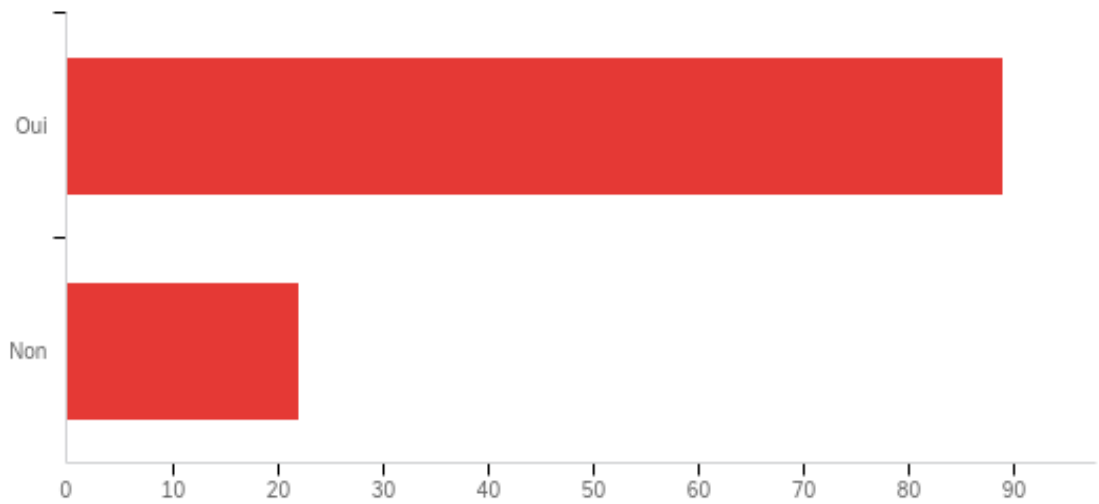
Q4 - Quel est votre revenu annuel ?



#	Field	Minimum	Maximum	Mean	Std Deviation	Variance	Count
1	Quel est votre revenu annuel ?	1.00	11.00	3.67	2.63	6.91	111

#	Answer	%	Count
1	Moins de CHF 10'000	22.52%	25
2	CHF 10'000 - CHF 19'999	18.02%	20
3	CHF 20'000 - CHF 29'999	21.62%	24
4	CHF 30'000 - CHF 39'999	10.81%	12
5	CHF 40'000 - CHF 49'999	4.50%	5
6	CHF 50'000 - CHF 59'999	5.41%	6
7	CHF 60'000 - CHF 69'999	6.31%	7
8	CHF 70'000 - CHF 79'999	3.60%	4
9	CHF 80'000 - CHF 89'999	2.70%	3
10	CHF 90'000 - CHF 99'999	1.80%	2
11	CHF 100'000 - CHF 149'999	2.70%	3
12	Plus de CHF 150'000	0.00%	0
	Total	100%	111

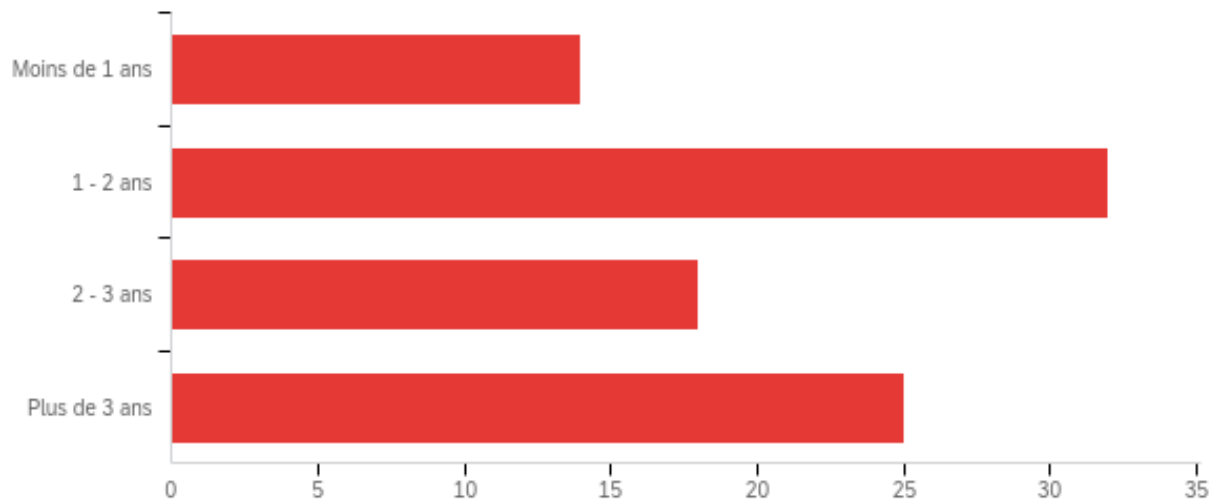
Q5 - Est-ce que tu pratiques une activité sportive de type fitness en salle ?



#	Field	Minimum	Maximum	Mean	Std Deviation	Variance	Count
1	Est-ce que tu pratiques une activité sportive de type fitness en salle ?	1.00	2.00	1.20	0.40	0.16	111

#	Answer	%	Count
1	Oui	80.18%	89
2	Non	19.82%	22
	Total	100%	111

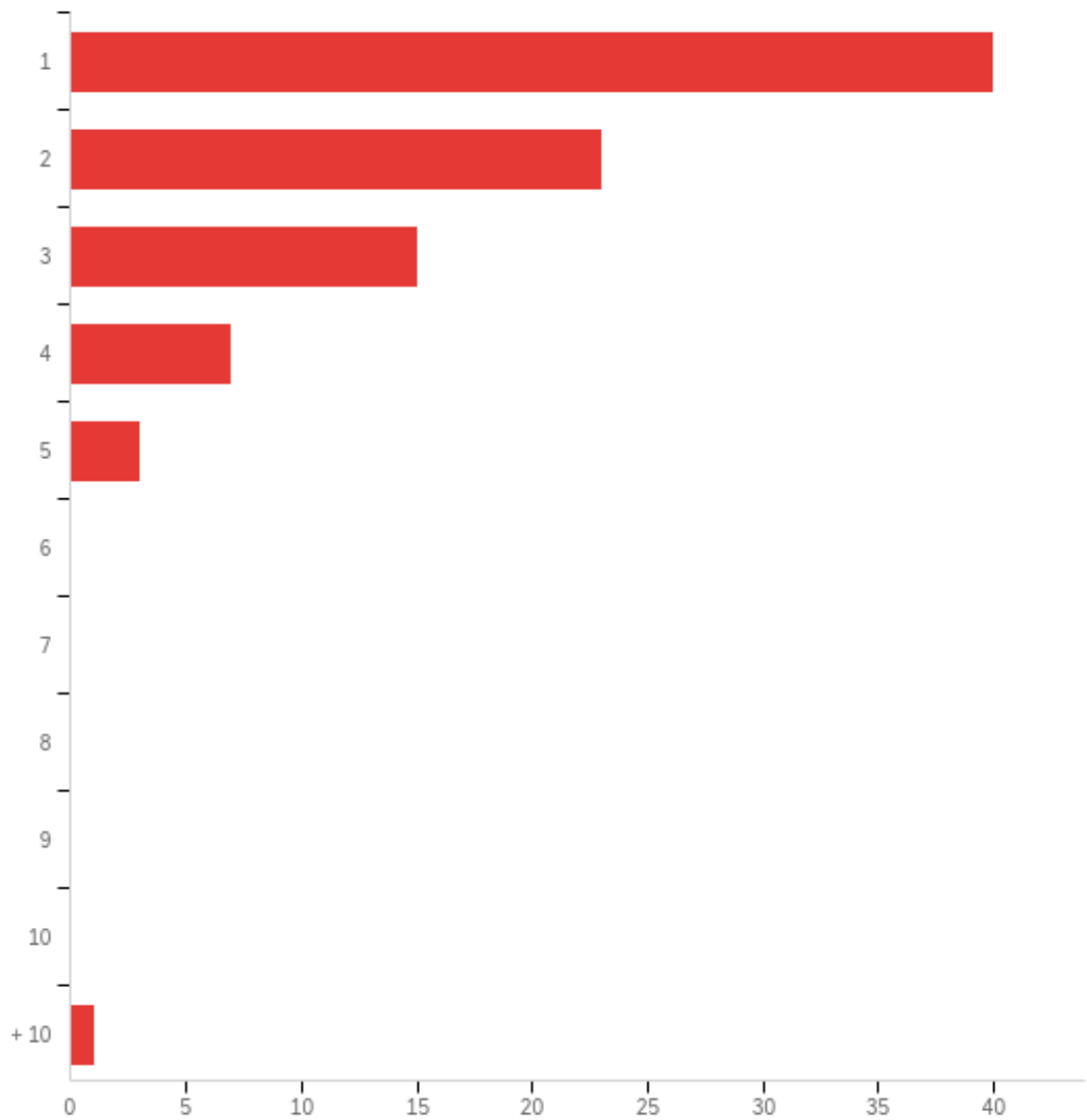
Q5 - Depuis combien de temps pratiques-tu ?



#	Field	Minimum	Maximum	Mean	Std Deviation	Variance	Count
1	Depuis combien de temps pratiques-tu ?	1.00	4.00	2.61	1.06	1.12	89

#	Answer	%	Count
1	Moins de 1 ans	15.73%	14
2	1 - 2 ans	35.96%	32
3	2 - 3 ans	20.22%	18
4	Plus de 3 ans	28.09%	25
	Total	100%	89

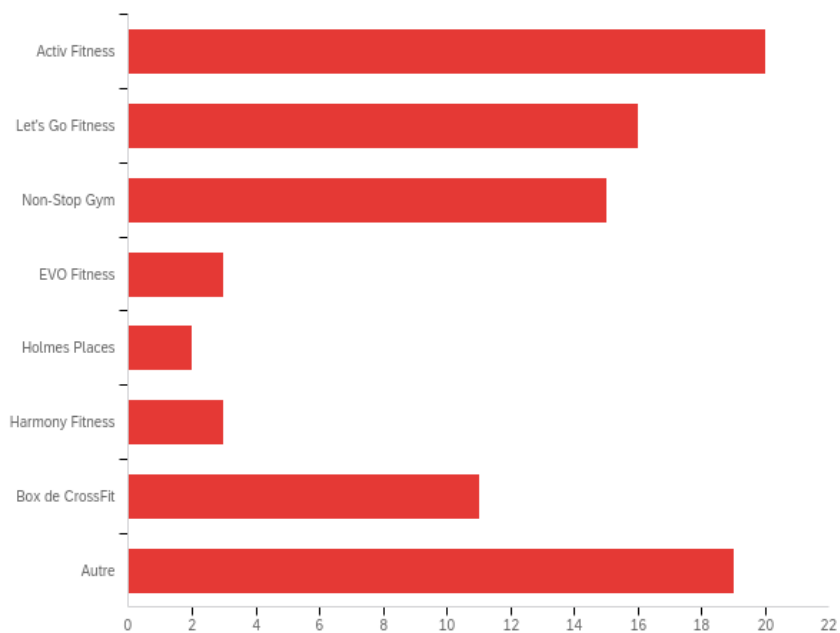
Q6 - Dans combien de fitness différents t'es-tu déjà inscrit ?



#	Field	Minimum	Maximum	Mean	Std Deviation	Variance	Count
1	Dans combien de fitness différents t'es-tu déjà inscrit ?	1.00	11.00	2.08	1.46	2.14	89

#	Answer	%	Count
1	1	44.94%	40
2	2	25.84%	23
3	3	16.85%	15
4	4	7.87%	7
5	5	3.37%	3
6	6	0.00%	0
7	7	0.00%	0
8	8	0.00%	0
9	9	0.00%	0
10	10	0.00%	0
11	+ 10	1.12%	1
	Total	100%	89

#### Q7 - Dans quel fitness es-tu inscrit en ce moment?



#	Field	Minimum	Maximum	Mean	Std Deviation	Variance	Count
1	Dans quel fitness es-tu inscrit en ce moment? - Selected Choice	1.00	8.00	4.11	2.75	7.58	89

#	Answer	%	Count
1	Activ Fitness	22.47%	20
2	Let's Go Fitness	17.98%	16
3	Non-Stop Gym	16.85%	15
4	EVO Fitness	3.37%	3
5	Holmes Places	2.25%	2
6	Harmony Fitness	3.37%	3
7	Box de CrossFit	12.36%	11
8	Autre	21.35%	19
	Total	100%	89

Q7\_8\_TEXT - Autre

Autre - Texte

---

American Fitness

---

chez moi

---

american fitness

---

My Club Fitness



American Fitess

Basic-Fit

My Club Fitness

American fitness

Neoness

Garage gym

Gold gym

Chez moi

Fitness de la société où je travaille

Malley fitness parc

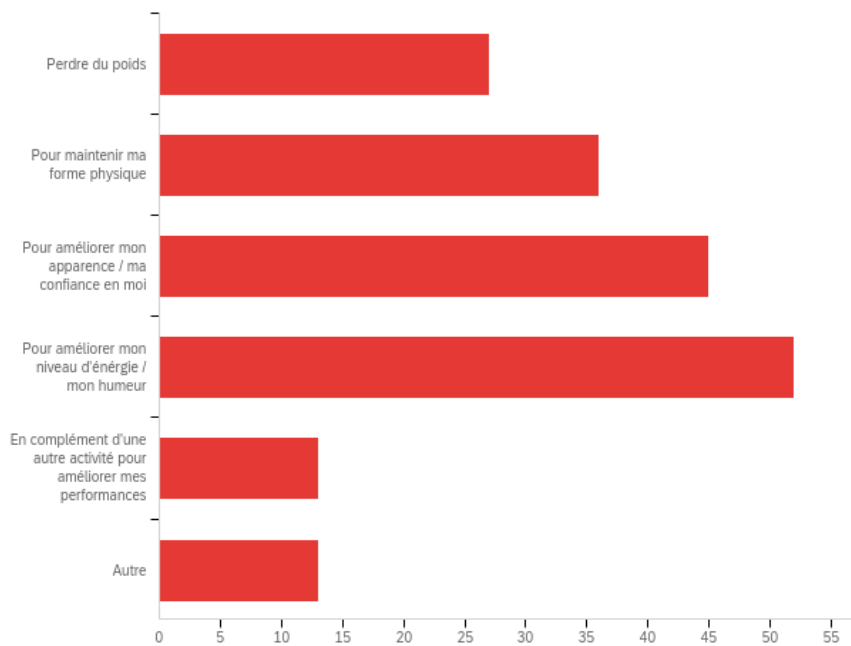
Q8 - Quel est le prix de ton abonnement à l'année (plus ou moins) ?

#	Field	Minimum	Maximum	Mean	Std Deviation	Variance	Count
1	Coût abonnement annuel	0.00	2110.00	836.54	345.71	119515.95	87

Q9 - Jusqu'à combien serais-tu prêt à payer (plus ou moins) ?

#	Field	Minimum	Maximum	Mean	Std Deviation	Variance	Count
1	Coût abonnement annuel	137.00	2506.00	993.77	364.03	132515.29	86

Q10 - Pour quels raisons principales faites-vous du fitness?



#	Answer	%	Count
1	Perdre du poids	31.03%	27
2	Pour maintenir ma forme physique	41.38%	36
3	Pour améliorer mon apparence / ma confiance en moi	51.72%	45
4	Pour améliorer mon niveau d'énergie / mon humeur	59.77%	52
5	En complément d'une autre activité pour améliorer mes performances	14.94%	13
6	Autre	14.94%	13
	Total	100%	87

Q10\_6\_TEXT - Autre

Autre - Texte

Voir des connaissances

Dépassement de soi, défi

Créer du lien social avec des gens

Travail de force, explosivité

Developper masse musculaire

Me sentir bien dans ma peau

Compétition

par plaisir

Pour le défi

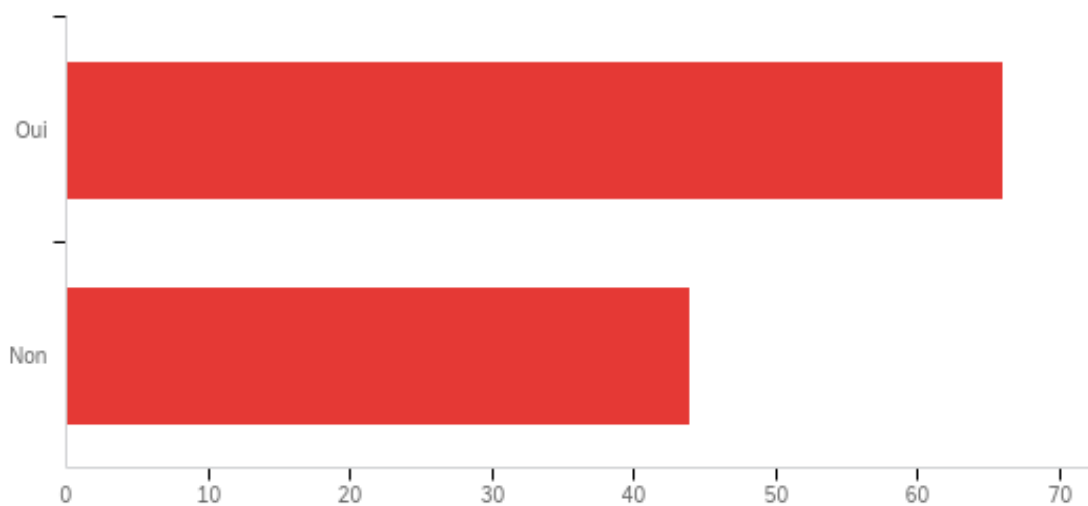
Sociabilité

ma confiance en moi

gagner en force

Vider la tête

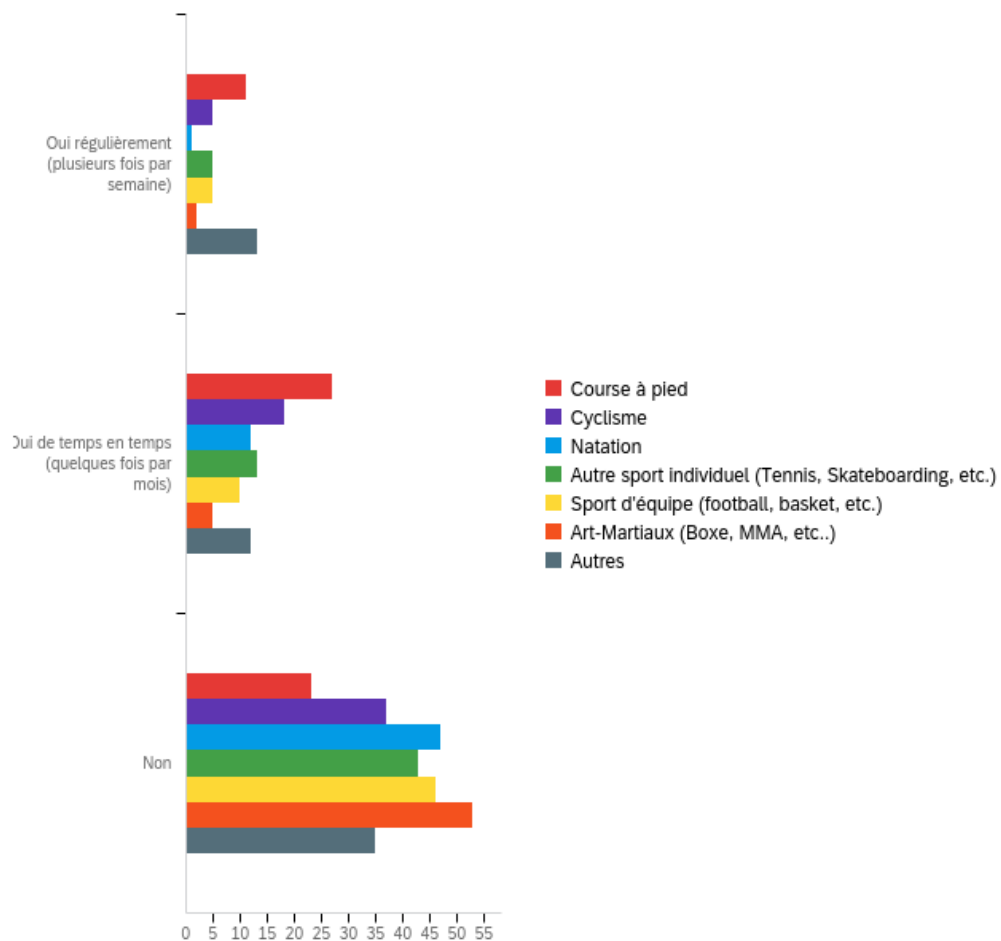
Q11 - Pratiques-tu une autre activité sportive ?



#	Field	Minimum	Maximum	Mean	Std Deviation	Variance	Count
1	Pratiques-tu une autre activité sportive ?	1.00	2.00	1.40	0.49	0.24	110

#	Answer	%	Count
1	Oui	60.00%	66
2	Non	40.00%	44
	Total	100%	110

Q12 - Pratiques-tu l'un des sports proposés ci-dessous ?



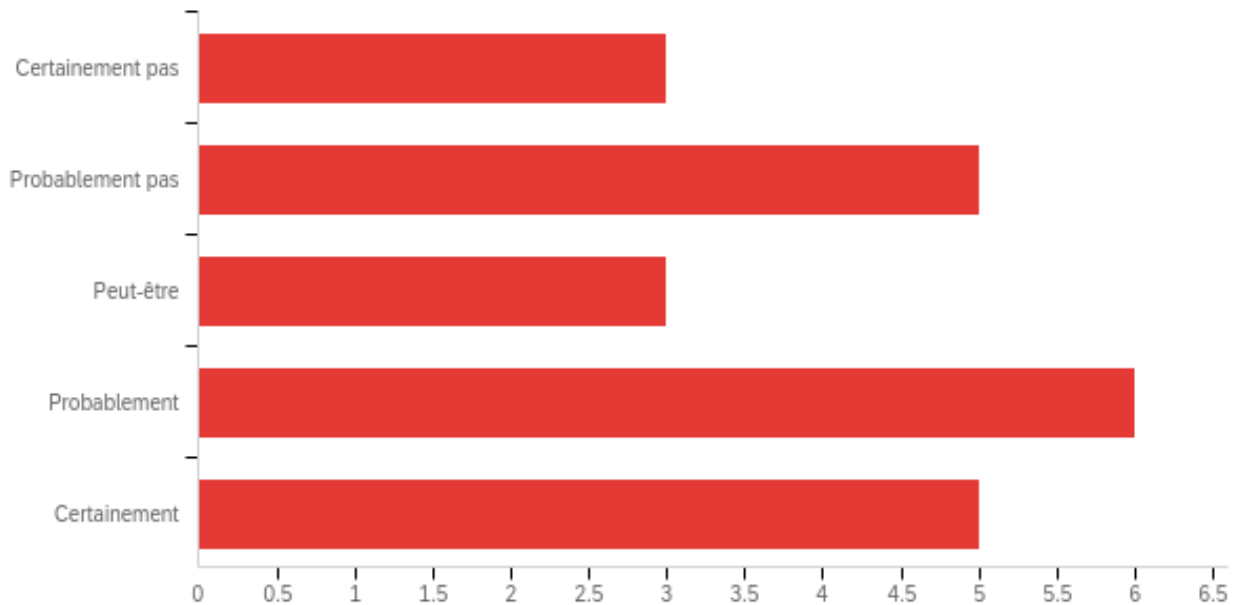
#	Field	Minimum	Maximum	Mean	Std Deviation	Variance	Count
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6	Art-Martiaux (Boxe, MMA, etc..)	1.00	3.00	2.85	0.44	0.19	60
3	Natation	1.00	3.00	2.77	0.46	0.21	60
5	Sport d'équipe (football, basket, etc.)	1.00	3.00	2.67	0.62	0.38	61
4	Autre sport individuel (Tennis, Skateboarding, etc.)	1.00	3.00	2.62	0.63	0.40	61
2	Cyclisme	1.00	3.00	2.53	0.64	0.42	60
7	Autres	1.00	3.00	2.37	0.82	0.67	60
1	Course à pied	1.00	3.00	2.20	0.72	0.52	61

#	Question	Oui régulièrement (plusieurs fois par semaine)		Oui de temps en temps (quelques fois par mois)		Non		Total
1	Course à pied	18.03%	11	44.26%	27	37.70%	23	61
2	Cyclisme	8.33%	5	30.00%	18	61.67%	37	60
3	Natation	1.67%	1	20.00%	12	78.33%	47	60
4	Autre sport individuel (Tennis, Skateboarding, etc.)	8.20%	5	21.31%	13	70.49%	43	61
5	Sport d'équipe (football, basket, etc.)	8.20%	5	16.39%	10	75.41%	46	61

6	Art-Martiaux (Boxe, MMA, etc..)	3.33%	2	8.33%	5	88.33%	53	60
7	Autres	21.67%	13	20.00%	12	58.33%	35	60

Q13 - Est-ce que vous seriez intéressé par la pratique du fitness en complément de votre activité sportive actuelle ?



#	Field	Minimum	Maximum	Mean	Std Deviation	Variance	Count
1	Est-ce que vous seriez intéressé par la pratique du fitness en complément de votre activité sportive actuelle ?	1.00	5.00	3.23	1.38	1.90	22

#	Answer	%	Count
---	--------	---	-------

1	Certainement pas	13.64%	3
2	Probablement pas	22.73%	5
3	Peut-être	13.64%	3
4	Probablement	27.27%	6
5	Certainement	22.73%	5
	Total	100%	22

Q14 - Quels sont les motifs qui vous dissuade de faire du fitness pour le moment ? (réponse facultative)

Quels sont les motifs qui vous dissuade de faire du fitness pour le moment ? (réponse facultative)

Je préfère travailler à la maison

Je possède une application pour faire du fitness chez moi

Attitude des gens dan les salles

J'aime pas les gens dans les salles de fit

Difficile avec autre obligation: famille, travail

L'ambiance et le manque de suivi

L'argent

Je fais déjà du fit 😊

Coûts

Le prix

Le manque de temps

Intérieur, population

Mes horaires de travail

Pas assez de temps de récupération si je l'ajoute à mon programme

J'aime pas les salles

Le temps

Le manque du temps après le boulot

J'en ai déjà pratiqué mais j'ai arrêté par manque de motivation et gêne lorsqu'il y a d'autres gens. Ne pas avoir de programmes précis.

Q15 - Quels sont pour vous les critères les plus importants lors que vous choisissez-votre club ? Juger les facteurs suivant de 0 à 5. (Si pas du tout pris en considération laissez 0).

#	Field	Minimum	Maximum	Mean	Std Deviation	Variance	Count
2	Distance du domicile	2.00	5.00	4.23	0.77	0.60	86
1	Prix	0.00	5.00	3.60	1.23	1.52	86
13	Espace à disposition lors de forte influence / Congestion	0.00	5.00	3.47	1.16	1.34	79
9	Zone poids libre	0.00	5.00	3.36	1.30	1.69	81
8	Ambiance de la salle	0.00	5.00	3.29	1.24	1.55	82
12	Accès 24/24H	0.00	5.00	3.13	1.58	2.50	83
11	Zone Functional Training	0.00	5.00	3.13	1.20	1.44	77
3	Attitude du staff	0.00	5.00	2.88	1.36	1.85	86
10	Zone Cardio	0.00	5.00	2.48	1.25	1.56	81
5	Cours collectifs disponibles	0.00	5.00	2.14	1.59	2.52	76



6	Programmes personnalisés	0.00	5.00	2.08	1.46	2.12	77
7	Coaching individuel	0.00	5.00	1.81	1.45	2.10	74
4	SPA & Zone de détente	0.00	5.00	1.58	1.17	1.38	74

Q16 - Les facteurs suivants doivent-ils être pris en considération par un club de sport pour être attrayant pour vous ? (Laissez 0 si ce n'est pas du tout important pour vous)

#	Field	Minimum	Maximum	Mean	Std Deviation	Variance	Count
3	Site internet	0.00	5.00	3.89	1.43	2.05	81
1	Présence sur les réseaux sociaux (Facebook, Instagram, etc...)	0.00	5.00	2.51	1.32	1.73	77
2	Interactivité sur les réseaux sociaux (Influenceurs, post réguliers)	0.00	5.00	2.17	1.28	1.64	76
4	Application mobile	0.00	5.00	2.11	1.33	1.77	79
5	Appareils de fitness connectés	0.00	5.00	1.20	1.07	1.14	71

Q17 - Y a-t-il autre chose d'important que vous prenez en considération lorsque vous choisissez une salle de sport ? (réponse facultative)

Y a-t-il autre chose d'important que vous prenez en considération lorsque vous choisissez une salle de sport ? (réponse facultative)

Politesse du personnel

---

La propreté

---

L'espace disponible dans la salle pour se mouvoir et l'eclairage

---

Propreté, l'attitude de la clientèle envers les autres membres, ne pas juger

---

Attitude des gens

---

Population de la salle de fitness, je préfère une salle qui a des valeurs sportives similaires à moi même

---

Une salle propre, des gens sympa, actuellement je fais du fitness à la maison

---

Les gens qui fréquentent la salle si ils sont sympa ou non

---

entretien de la salle, luminosité

---

La possibilité de se désabonner à tout moment, les horaires flexibles meme si pas 24h/24 pour aller tot le matin les weekend

---

Hygiène des lieux, les vestiaires par exemp

---

La compétence des instructeurs dans une démarche de crossfit mais aussi dans les fitness que j'ai fréquenté, leur sympathie aussi

---

Les machines pour l'isolation

---

l'entretien des salles et la luminosité :)

---

sa localisation par rapport à mon lieu de travail et la propreté des lieux

---

Les machines pour le travail du bas de corps

---

Propreté

---

Je fais du crossfit, ce qui est important c'est un bon coaching et une bonne ambiance dans la box

---

Les machines et la propreté des lieux

---

les machines pour travailler les muscles spécifiques

---

Des cours avec des horaires flexibles

---

Une zone de machine avec poids libre

J'aime bien les machines

---

Propreté des lieux, machine à disposition

---

Zone de machine

---

l'atmosphère de la salle, l'ambiance

---

non

---

Propreté de l'ensemble. Appareils neufs.

---

Les différents / nouveaux matériels pour les exercices et e-exercice des machines électriques au lieu de poids normale

---

Pour le crossfit organiser des choses pour le côté communauté

---

Cours vidéos en ligne

---

Ambiance/bienveillance du staff (pas de jugement, on t'accueille comme tu es)

---

activités extra: ex journée spéciale avec un challenge et une bouffe

---

Le prof de sport pour les cours collectifs (s'il est bon)

---

Le coaching

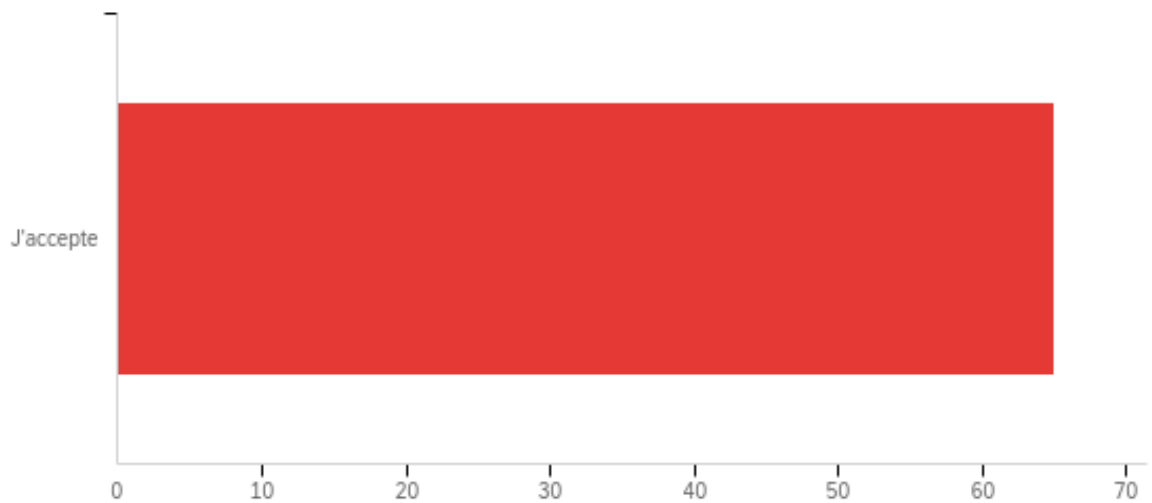
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## Appendix 3: Women report

# Women Report

BT\_Fitness\_Industry\_Survey

Intro - Bonjour,Je vous remercie par avance pour le temps que vous m'accordez dans le cadre de ce sondage&nb

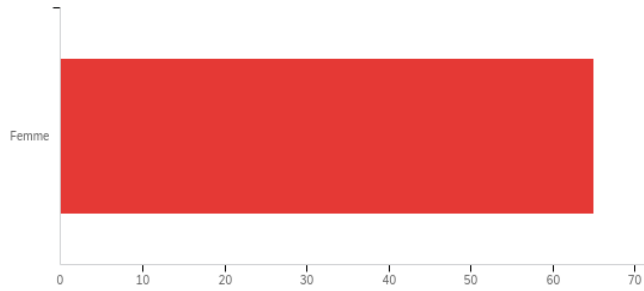


#	Field	Minimum	Maximum	Mean	Std Deviation	Variance	Count
1	Bonjour,Je vous remercie par avance pour le temps que vous m'accordez dans le cadre de ce sondage&nb	1.00	1.00	1.00	0.00	0.00	65

#	Answer	%	Count
---	--------	---	-------

1	J'accepte	100.00%	65
	Total	100%	65

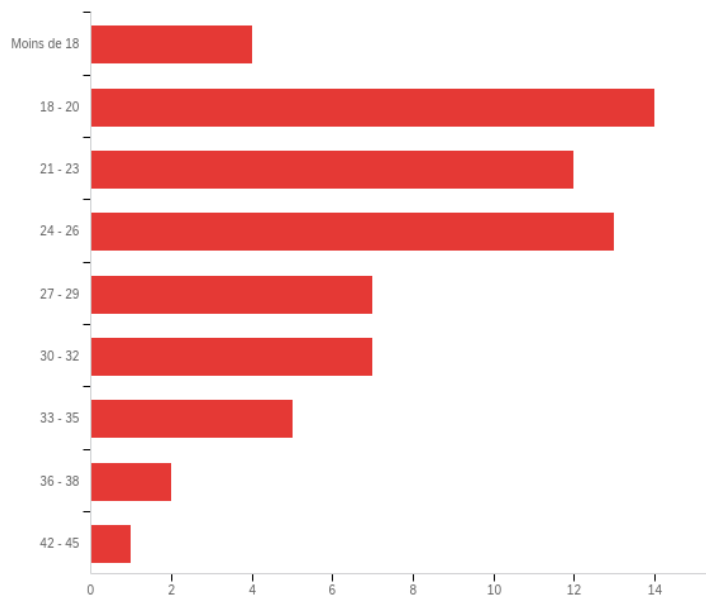
Q1 - Tu es un/une...



#	Field	Minimum	Maximum	Mean	Std Deviation	Variance	Count
1	Tu es un/une...	2.00	2.00	2.00	0.00	0.00	65

#	Answer	%	Count
1	Femme	100.00%	65
	Total	100%	65

Q2 - Quel âge as-tu ?



#	Field	Minimum	Maximum	Mean	Std Deviation	Variance	Count
1	Quel âge as-tu ?	1.00	10.00	3.97	1.97	3.88	65

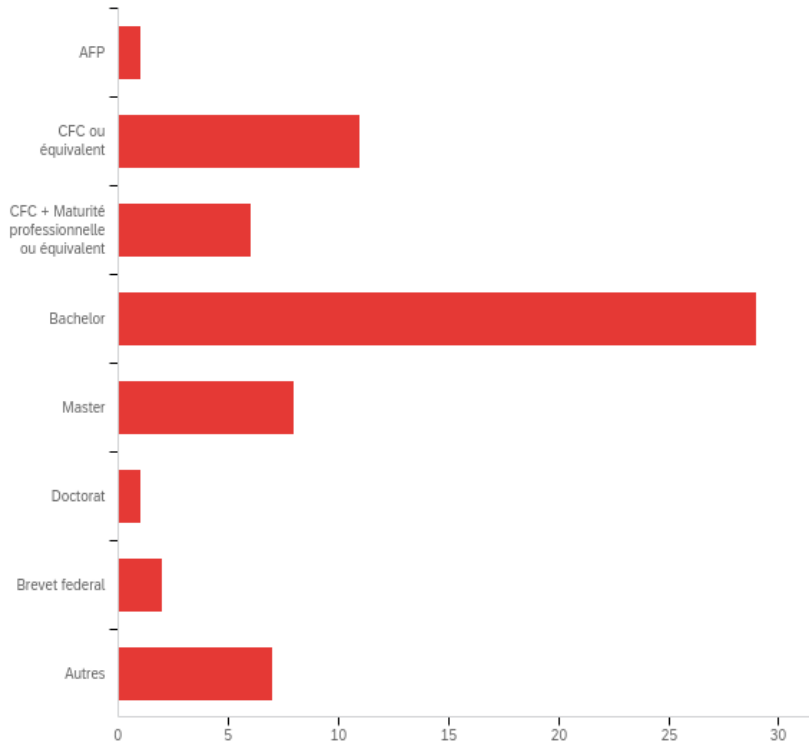
#	Answer	%	Count
1	Moins de 18	6.15%	4
2	18 - 20	21.54%	14
3	21 - 23	18.46%	12
4	24 - 26	20.00%	13
5	27 - 29	10.77%	7
6	30 - 32	10.77%	7
7	33 - 35	7.69%	5
8	36 - 38	3.08%	2
9	42 - 45	1.54%	1

Total

100%

65

Q3 - Quel est votre niveau d'étude ?



#	Field	Minimum	Maximum	Mean	Std Deviation	Variance	Count
1	Quel est votre niveau d'étude ? - Selected Choice	1.00	8.00	4.20	1.75	3.05	65

#	Answer	%	Count
1	AFP	1.54%	1
2	CFC ou équivalent	16.92%	11

3	CFC + Maturité professionnelle ou équivalent	9.23%	6
4	Bachelor	44.62%	29
5	Master	12.31%	8
6	Doctorat	1.54%	1
7	Brevet federal	3.08%	2
8	Autres	10.77%	7
	Total	100%	65

### Q3\_8\_TEXT - Autres

Autres - Texte

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En étude

---

En cours de bachelor

---

En cours d'étude

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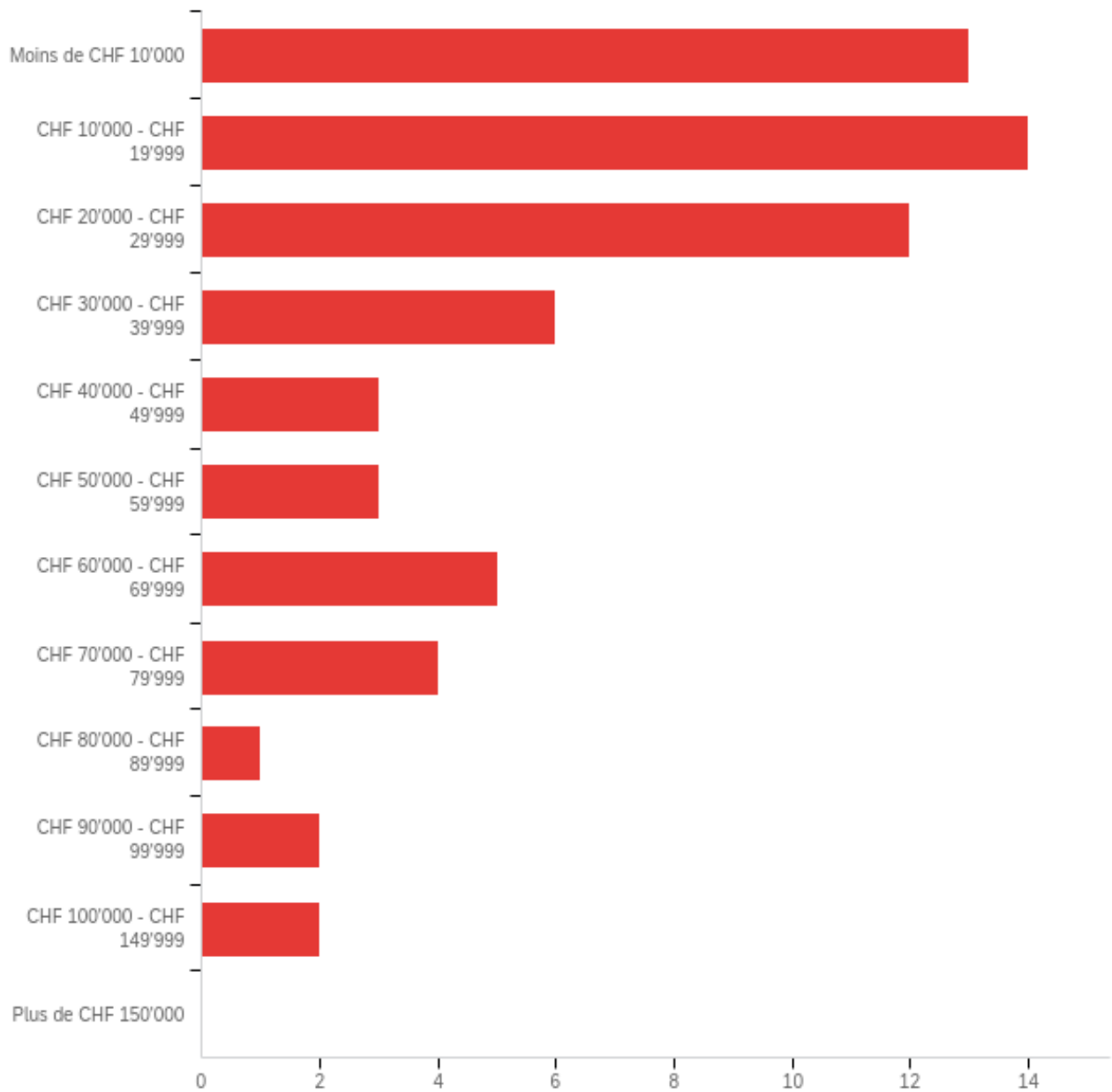
en cours de bachelor

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Actuellement en étude supérieure ES



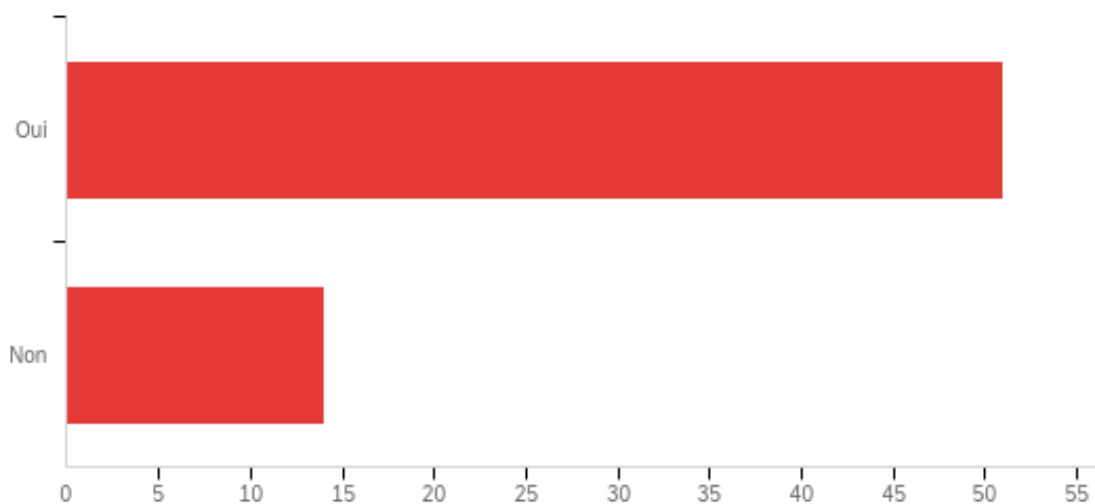
#### Q4 - Quel est votre revenu annuel ?



#	Field	Minimum	Maximum	Mean	Std Deviation	Variance	Count
1	Quel est votre revenu annuel ?	1.00	11.00	3.88	2.78	7.74	65

#	Answer	%	Count
1	Moins de CHF 10'000	20.00%	13
2	CHF 10'000 - CHF 19'999	21.54%	14
3	CHF 20'000 - CHF 29'999	18.46%	12
4	CHF 30'000 - CHF 39'999	9.23%	6
5	CHF 40'000 - CHF 49'999	4.62%	3
6	CHF 50'000 - CHF 59'999	4.62%	3
7	CHF 60'000 - CHF 69'999	7.69%	5
8	CHF 70'000 - CHF 79'999	6.15%	4
9	CHF 80'000 - CHF 89'999	1.54%	1
10	CHF 90'000 - CHF 99'999	3.08%	2
11	CHF 100'000 - CHF 149'999	3.08%	2
12	Plus de CHF 150'000	0.00%	0
	Total	100%	65

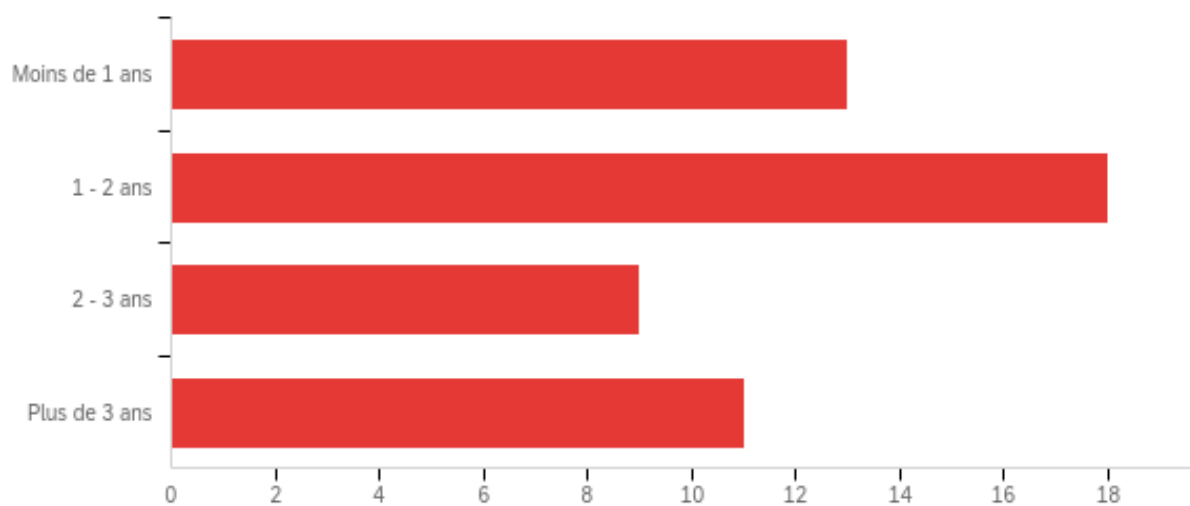
Q5 - Est-ce que tu pratiques une activité sportive de type fitness en salle ?



#	Field	Minimum	Maximum	Mean	Std Deviation	Variance	Count
1	Est-ce que tu pratiques une activité sportive de type fitness en salle ?	1.00	2.00	1.22	0.41	0.17	65

#	Answer	%	Count
1	Oui	78.46%	51
2	Non	21.54%	14
	Total	100%	65

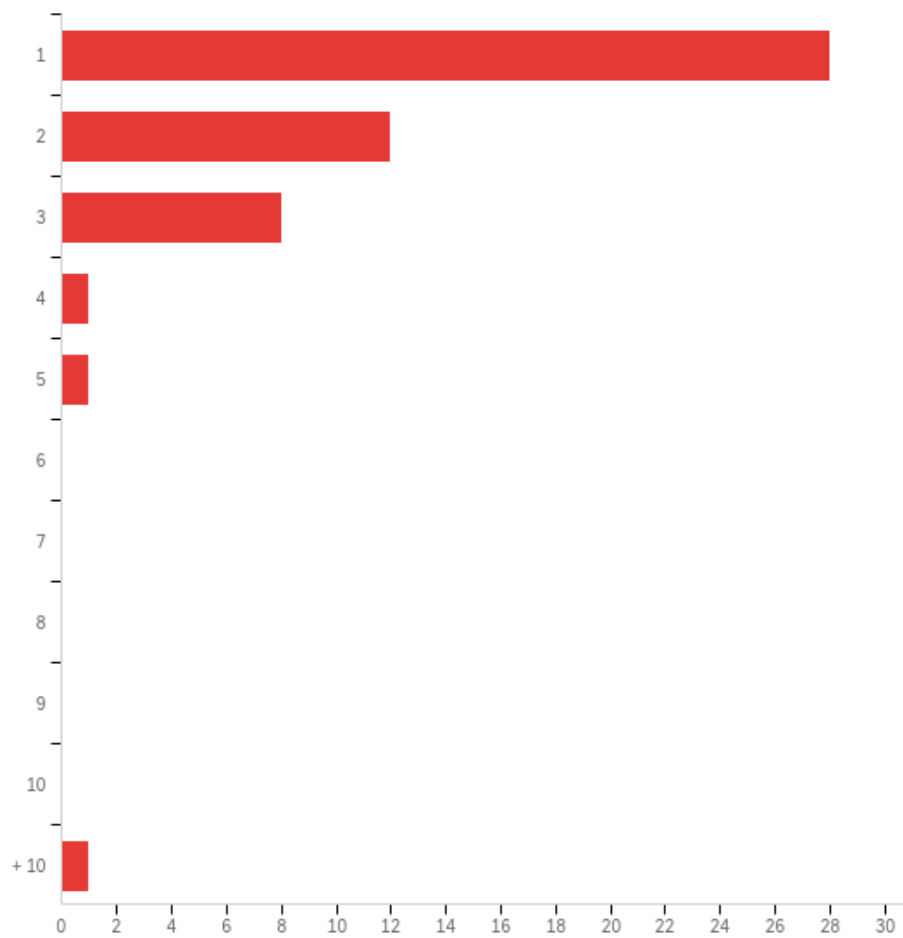
Q5 - Depuis combien de temps pratiques-tu ?



#	Field	Minimum	Maximum	Mean	Std Deviation	Variance	Count
1	Depuis combien de temps pratiques-tu ?	1.00	4.00	2.35	1.08	1.17	51

#	Answer	%	Count
1	Moins de 1 ans	25.49%	13
2	1 - 2 ans	35.29%	18
3	2 - 3 ans	17.65%	9
4	Plus de 3 ans	21.57%	11
	Total	100%	51

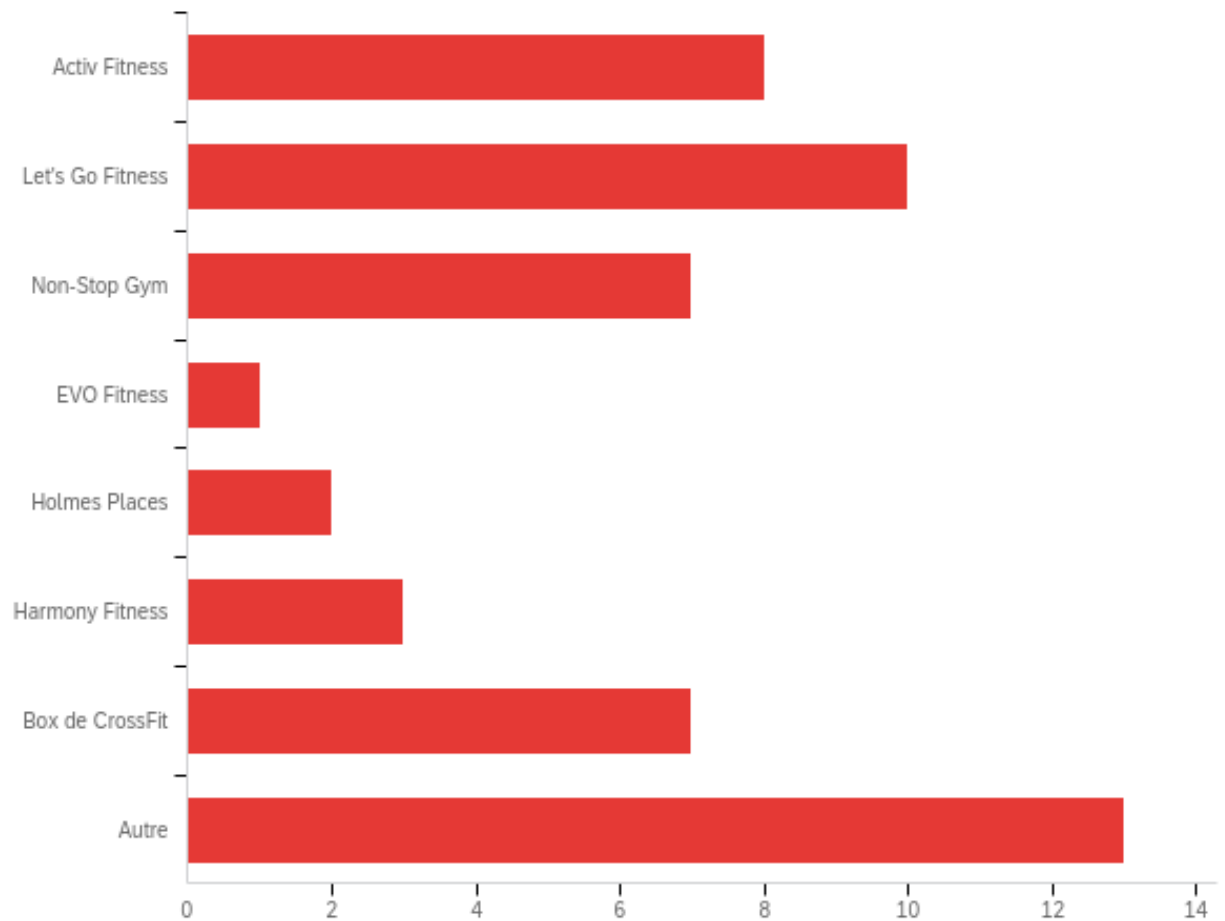
Q6 - Dans combien de fitness différents t'es-tu déjà inscrit ?



#	Field	Minimum	Maximum	Mean	Std Deviation	Variance	Count
1	Dans combien de fitness différents t'es-tu déjà inscrit ?	1.00	11.00	1.88	1.59	2.54	51

#	Answer	%	Count
1	1	54.90%	28
2	2	23.53%	12
3	3	15.69%	8
4	4	1.96%	1
5	5	1.96%	1
6	6	0.00%	0
7	7	0.00%	0
8	8	0.00%	0
9	9	0.00%	0
10	10	0.00%	0
11	+ 10	1.96%	1
	Total	100%	51

Q7 - Dans quel fitness es-tu inscrit en ce moment?



#	Field	Minimum	Maximum	Mean	Std Deviation	Variance	Count
1	Dans quel fitness es-tu inscrit en ce moment? - Selected Choice	1.00	8.00	4.59	2.75	7.58	51

#	Answer	%	Count
1	Activ Fitness	15.69%	8
2	Let's Go Fitness	19.61%	10
3	Non-Stop Gym	13.73%	7

4	EVO Fitness	1.96%	1
5	Holmes Places	3.92%	2
6	Harmony Fitness	5.88%	3
7	Box de CrossFit	13.73%	7
8	Autre	25.49%	13
	Total	100%	51

#### Q7\_8\_TEXT - Autre

Autre - Texte

---

chez moi

---

american fitness

---

Basic-Fit

---

My Club Fitness

---

American fitness

---

Neoness

---

Chez moi

---

Fitness de la société où je travaille

---

Malley fitness parc

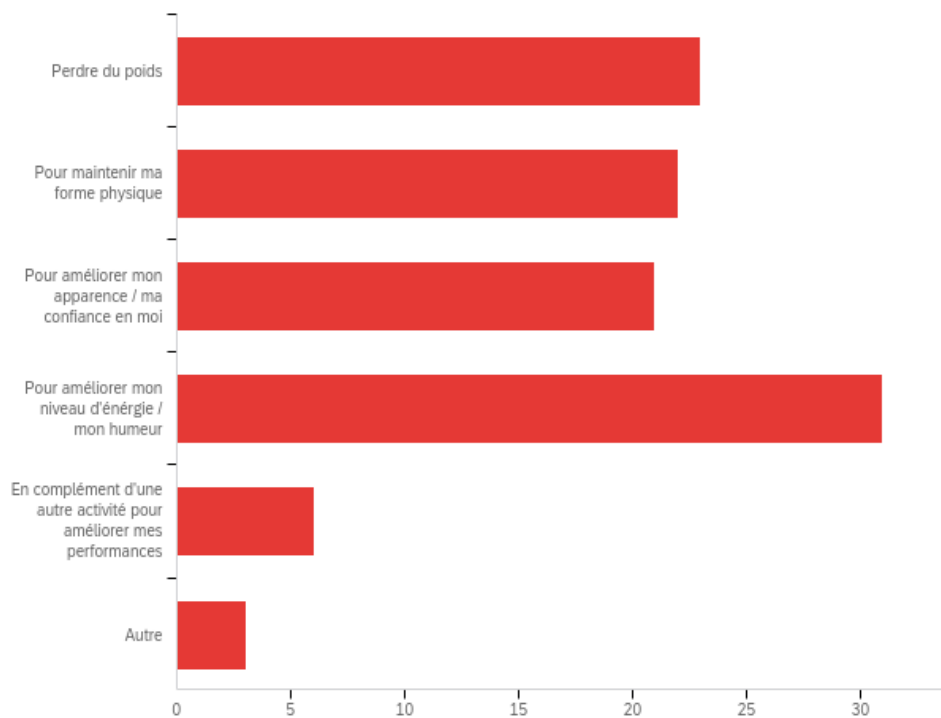
Q8 - Quel est le prix de ton abonnement à l'année (plus ou moins) ?

#	Field	Minimum	Maximum	Mean	Std Deviation	Variance	Count
1	Coût abonnement annuel	0.00	1514.00	873.51	359.34	129128.21	49

Q9 - Jusqu'à combien serais-tu prêt à payer (plus ou moins) ?

#	Field	Minimum	Maximum	Mean	Std Deviation	Variance	Count
1	Coût abonnement annuel	137.00	1811.00	981.56	333.22	111034.16	48

Q10 - Pour quels raisons principales faites-vous du fitness?





#	Answer	%	Count
1	Perdre du poids	46.00%	23
2	Pour maintenir ma forme physique	44.00%	22
3	Pour améliorer mon apparence / ma confiance en moi	42.00%	21
4	Pour améliorer mon niveau d'énergie / mon humeur	62.00%	31
5	En complément d'une autre activité pour améliorer mes performances	12.00%	6
6	Autre	6.00%	3
	Total	100%	50

#### Q10\_6\_TEXT - Autre

Autre - Texte

---

Me sentir bien dans ma peau

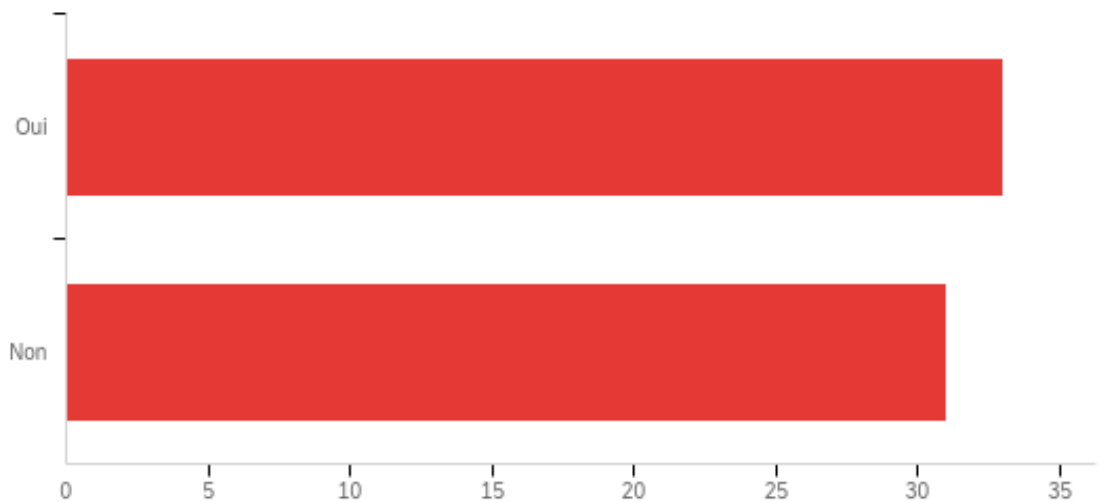
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Sociabilité

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ma confiance en moi

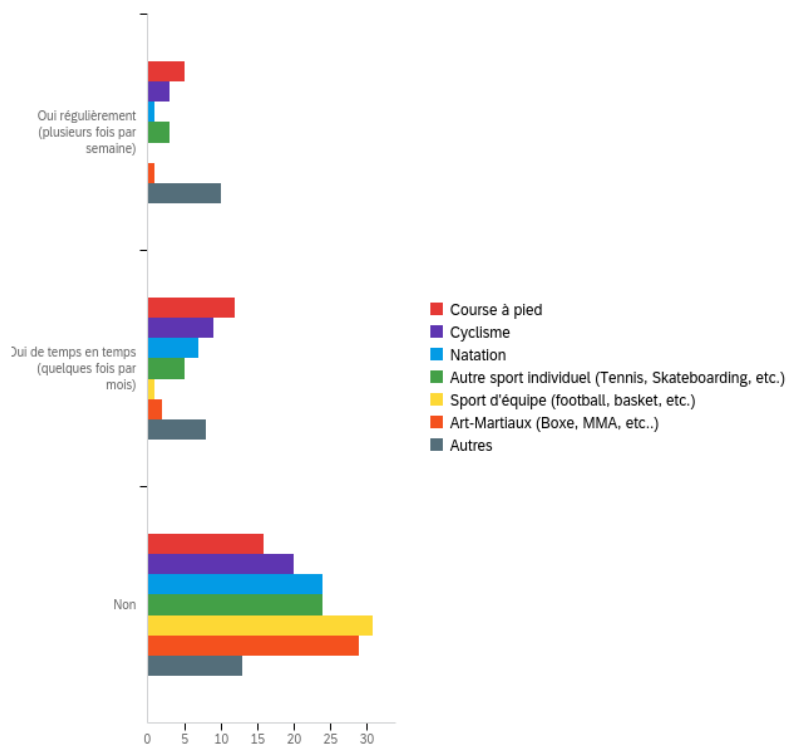
#### Q11 - Pratiques-tu une autre activité sportive ?



#	Field	Minimum	Maximum	Mean	Std Deviation	Variance	Count
1	Pratiques-tu une autre activité sportive ?	1.00	2.00	1.48	0.50	0.25	64

#	Answer	%	Count
1	Oui	51.56%	33
2	Non	48.44%	31
	Total	100%	64

#### Q12 - Pratiques-tu l'un des sports proposés ci-dessous ?

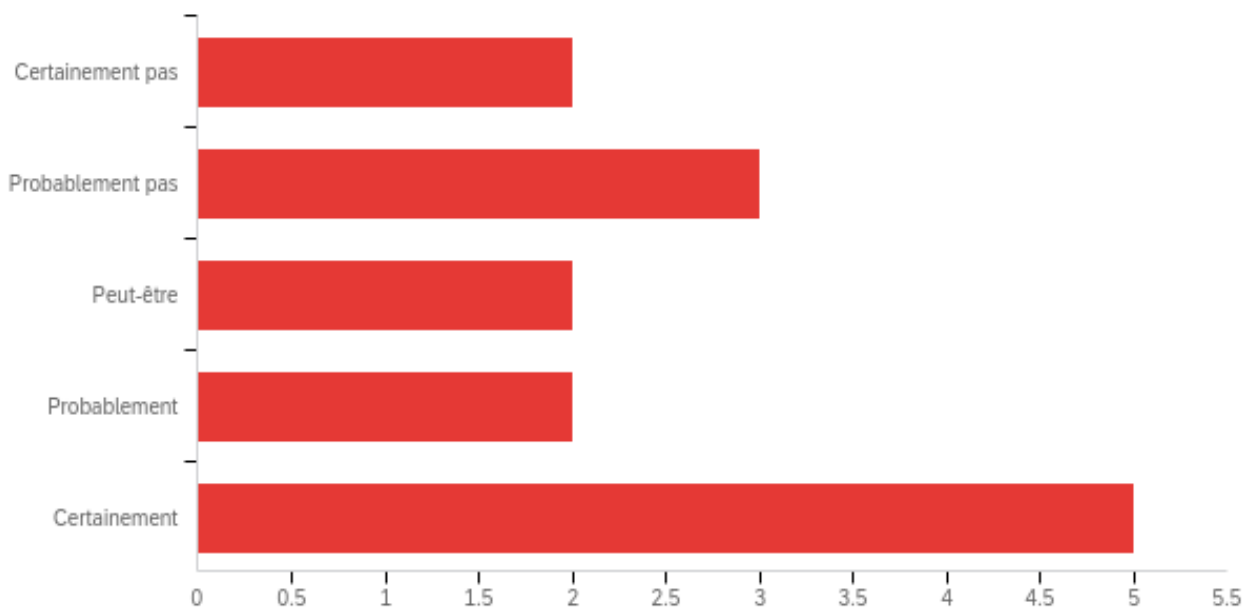


#	Field	Minimum	Maximum	Mean	Std Deviation	Variance	Count
5	Sport d'équipe (football, basket, etc.)	2.00	3.00	2.97	0.17	0.03	32
6	Art-Martiaux (Boxe, MMA, etc..)	1.00	3.00	2.88	0.41	0.17	32
3	Natation	1.00	3.00	2.72	0.51	0.26	32
4	Autre sport individuel (Tennis, Skateboarding, etc.)	1.00	3.00	2.66	0.64	0.41	32
2	Cyclisme	1.00	3.00	2.53	0.66	0.44	32
1	Course à pied	1.00	3.00	2.33	0.72	0.53	33
7	Autres	1.00	3.00	2.10	0.86	0.73	31

#	Question	Oui régulièrement (plusieurs fois par semaine)	Oui de temps en temps (quelques fois par mois)	Non	Total			
1	Course à pied	15.15%	5	36.36%	12	48.48%	16	33
2	Cyclisme	9.38%	3	28.13%	9	62.50%	20	32
3	Natation	3.13%	1	21.88%	7	75.00%	24	32
4	Autre sport individuel (Tennis, Skateboarding, etc.)	9.38%	3	15.63%	5	75.00%	24	32

5	Sport d'équipe (football, basket, etc.)	0.00%	0	3.13%	1	96.88%	31	32
6	Art-Martiaux (Boxe, MMA, etc..)	3.13%	1	6.25%	2	90.63%	29	32
7	Autres	32.26%	10	25.81%	8	41.94%	13	31

Q13 - Est-ce que vous seriez intéressé par la pratique du fitness en complément de votre activité sportive actuelle ?



#	Field	Minimum	Maximum	Mean	Std Deviation	Variance	Count
1	Est-ce que vous seriez intéressé par la pratique du fitness en complément de votre activité sportive actuelle ?	1.00	5.00	3.36	1.49	2.23	14

#	Answer	%	Count
1	Certainement pas	14.29%	2
2	Probablement pas	21.43%	3
3	Peut-être	14.29%	2
4	Probablement	14.29%	2
5	Certainement	35.71%	5
	Total	100%	14

Q14 - Quels sont les motifs qui vous dissuade de faire du fitness pour le moment ? (réponse facultative)

Quels sont les motifs qui vous dissuade de faire du fitness pour le moment ? (réponse facultative)

Je préfère travailler à la maison

Je possède une application pour faire du fitness chez moi

Attitude des gens dan les salles

Difficile avec autre obligation: famille, travail

L'ambiance et le manque de suivi

L'argent

Je fais déjà du fit 😊

Le prix

Intérieur, population

Le temps

## Le manque du temps après le boulot

J'en ai déjà pratiqué mais j'ai arrêté par manque de motivation et gêne lorsqu'il y a d'autres gens. Ne pas avoir de programmes précis.

Q15 - Quels sont pour vous les critères les plus importants lors que vous choisissez-votre club ? Juger les facteurs suivant de 0 à 5. (Si pas du tout pris en considération laissez 0).

#	Field	Minimum	Maximum	Mean	Std Deviation	Variance	Count
2	Distance du domicile	2.00	5.00	4.24	0.74	0.55	49
8	Ambiance de la salle	1.00	5.00	3.48	1.06	1.12	46
1	Prix	1.00	5.00	3.46	1.26	1.58	48
13	Espace à disposition lors de forte influence / Congestion	0.00	5.00	3.37	1.24	1.54	43
3	Attitude du staff	0.00	5.00	3.23	1.14	1.30	48
12	Accès 24/24H	0.00	5.00	2.89	1.64	2.68	45
11	Zone Functional Training	0.00	5.00	2.89	1.21	1.46	44
9	Zone poids libre	0.00	5.00	2.89	1.40	1.96	44
5	Cours collectifs disponibles	0.00	5.00	2.82	1.48	2.19	44
10	Zone Cardio	0.00	5.00	2.76	1.21	1.47	45
6	Programmes personnalisées	0.00	5.00	2.42	1.37	1.87	43
7	Coaching individuel	0.00	5.00	2.31	1.42	2.02	42

4	SPA & Zone de détente	0.00	5.00	1.61	1.34	1.80	41
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Q16 - Les facteurs suivants doivent-ils être pris en considération par un club de sport pour être attrayant pour vous ? (Laissez 0 si ce n'est pas du tout important pour vous)

#	Field	Minimum	Maximum	Mean	Std Deviation	Variance	Count
3	Site internet	0.00	5.00	4.04	1.29	1.66	47
1	Présence sur les réseaux sociaux (Facebook, Instagram, etc...)	0.00	5.00	2.66	1.26	1.59	44
4	Application mobile	0.00	5.00	2.26	1.34	1.81	47
2	Interactivité sur les réseaux sociaux (Influenceurs, post régulariers)	0.00	5.00	2.25	1.32	1.73	44
5	Appareils de fitness connectés	0.00	4.00	1.24	1.04	1.09	42

Q17 - Y a-t-il autre chose d'important que vous prenez en considération lorsque vous choisissez une salle de sport ? (réponse facultative)

Y a-t-il autre chose d'important que vous prenez en considération lorsque vous choisissez une salle de sport ? (réponse facultative)

---

Politesse du personnel

---

La propreté

---

Propreté, l'attitude de la clientèle envers les autres membres, ne pas juger

Une salle propre, des gens sympa, actuellement je fais du fitness à la maison

---

Les gens qui fréquentent la salle si ils sont sympa ou non

---

Hygiène des lieux, les vestiaires par exemp

---

l'entretien des salles et la luminosité :)

---

sa localisation par rapport à mon lieu de travail et la propreté des lieux

---

Les machines pour le travail du bas de corps

---

Les machines et la propreté des lieux

---

Des cours avec des horaires flexibles

---

J'aime bien les machines

---

l'atmosphère de la salle, l'ambiance

---

Propreté de l'ensemble. Appareils neufs.

---

Cours vidéos en ligne

---

Ambiance/bienveillance du staf (pas de jugement, on t'accueille comme tu es)

---

Le prof de sport pour les cours collectifs (s'il est bon)

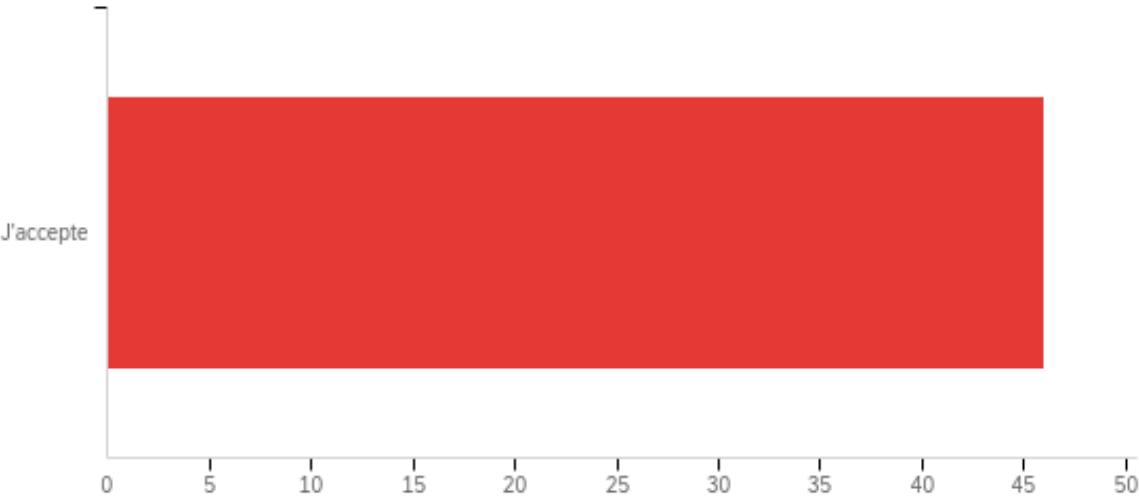
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Le coaching



### Appendix 3: Men report

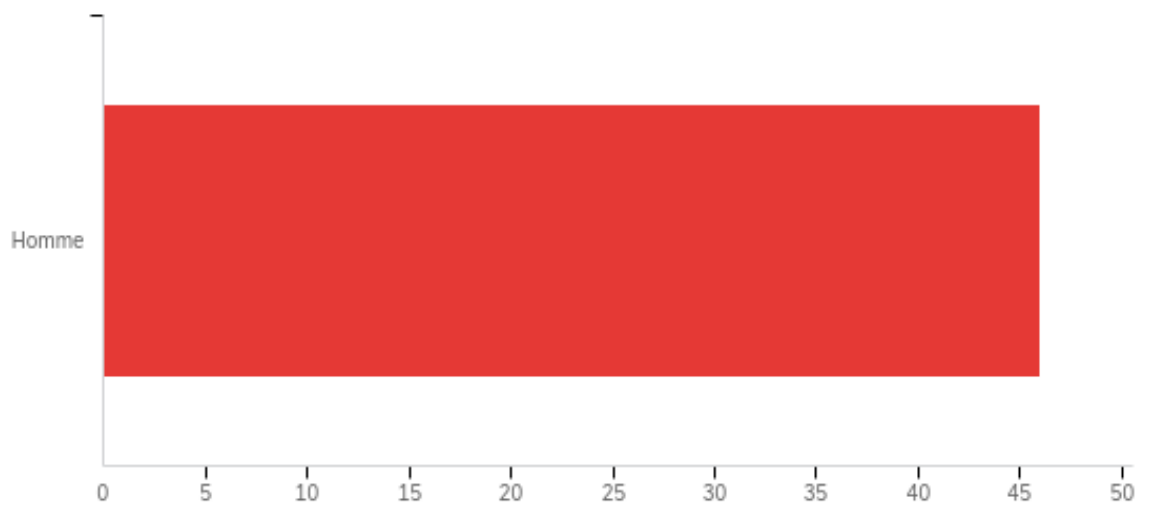
Intro - Bonjour,Je vous remercie par avance pour le temps que vous m'accordez dans le cadre de ce sondage&nb



#	Field	Minimum	Maximum	Mean	Std Deviation	Variance	Count
1	Bonjour,Je vous remercie par avance pour le temps que vous m'accordez dans le cadre de ce sondage&nb	1.00	1.00	1.00	0.00	0.00	46

#	Answer	%	Count
1	J'accepte	100.00%	46
	Total	100%	46

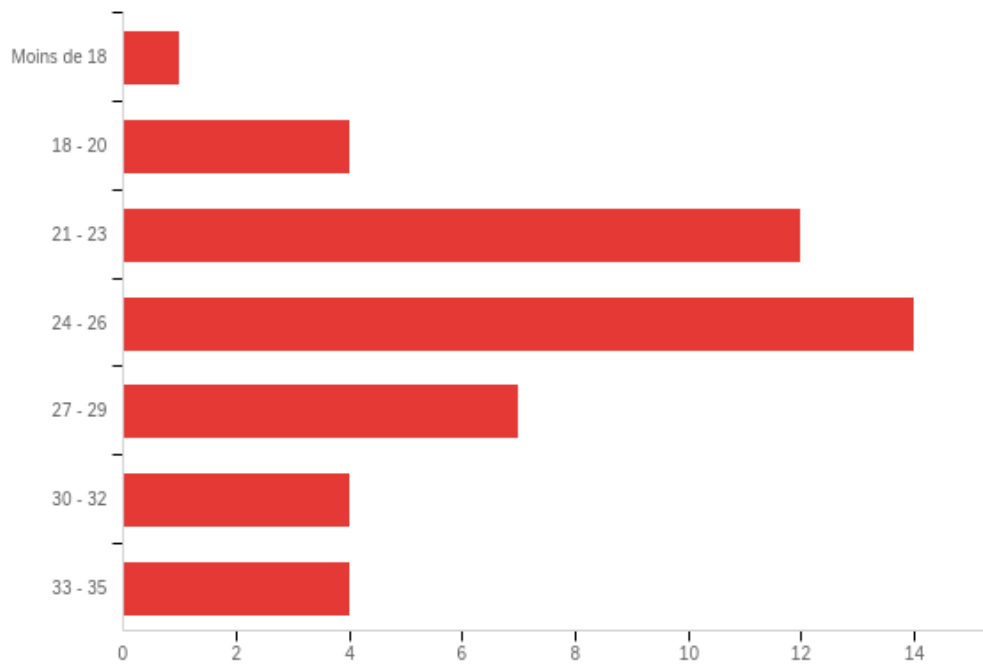
Q1 - Tu es un/une...



#	Field	Minimum	Maximum	Mean	Std Deviation	Variance	Count
1	Tu es un/une...	1.00	1.00	1.00	0.00	0.00	46

#	Answer	%	Count
1	Homme	100.00%	46
	Total	100%	46

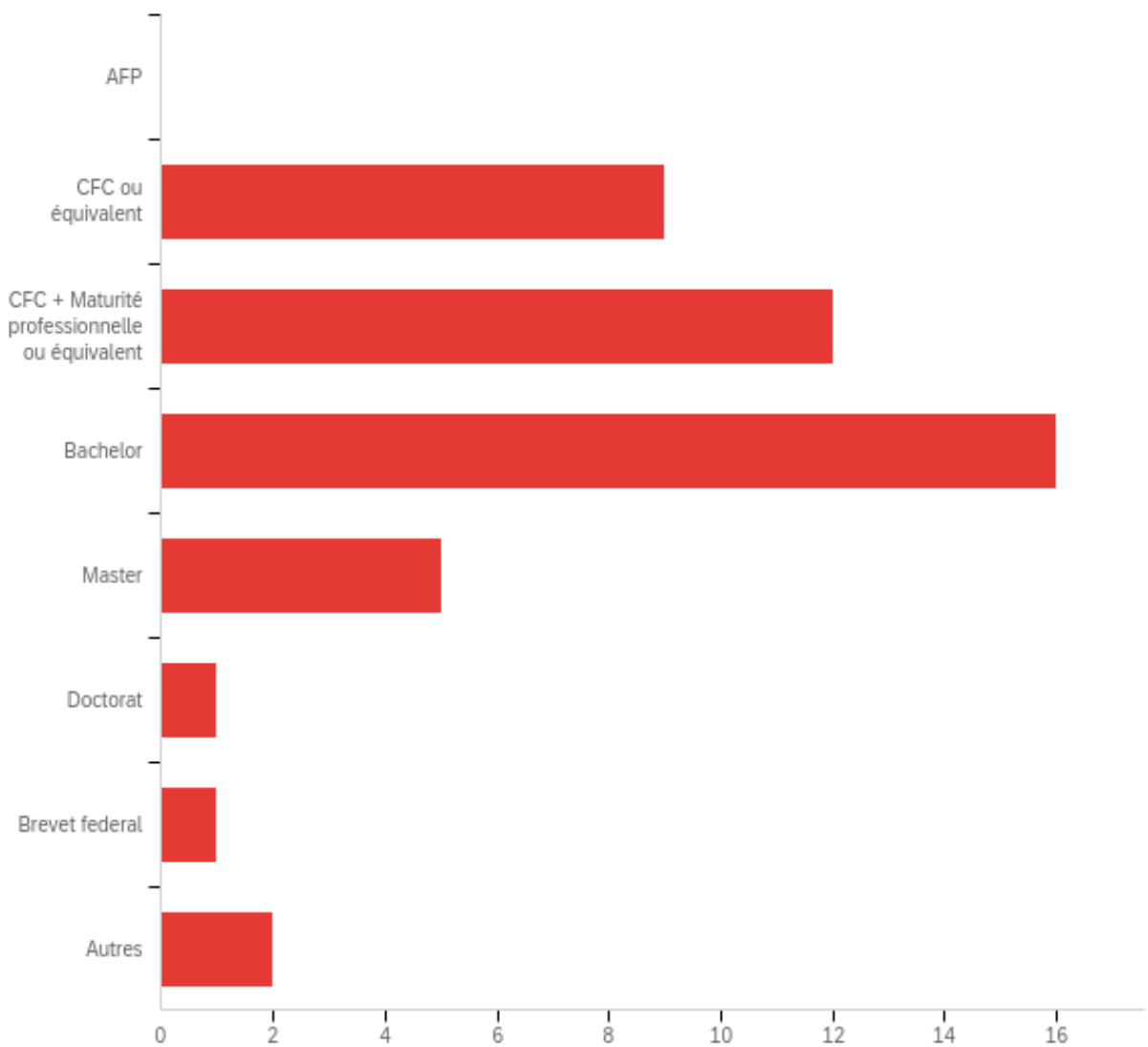
Q2 - Quel âge as-tu ?



#	Field	Minimum	Maximum	Mean	Std Deviation	Variance	Count
1	Quel âge as-tu ?	1.00	7.00	4.09	1.44	2.08	46

#	Answer	%	Count
1	Moins de 18	2.17%	1
2	18 - 20	8.70%	4
3	21 - 23	26.09%	12
4	24 - 26	30.43%	14
5	27 - 29	15.22%	7
6	30 - 32	8.70%	4
7	33 - 35	8.70%	4
	Total	100%	46

Q3 - Quel est votre niveau d'étude ?



#	Field	Minimum	Maximum	Mean	Std Deviation	Variance	Count
1	Quel est votre niveau d'étude ? - Selected Choice	2.00	8.00	3.74	1.44	2.06	46

#	Answer	%	Count
1	AFP	0.00%	0
2	CFC ou équivalent	19.57%	9
3	CFC + Maturité professionnelle ou équivalent	26.09%	12
4	Bachelor	34.78%	16
5	Master	10.87%	5
6	Doctorat	2.17%	1
7	Brevet federal	2.17%	1
8	Autres	4.35%	2
	Total	100%	46

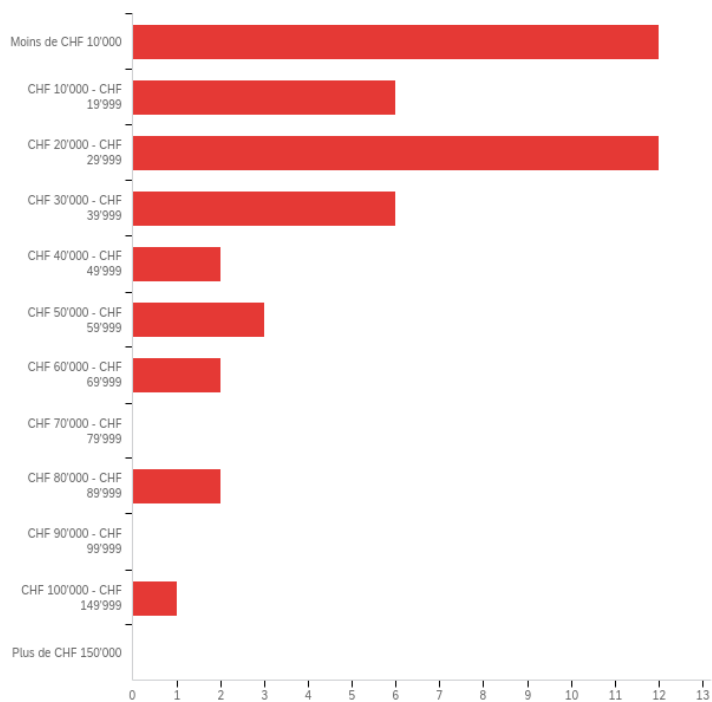
Q3\_8\_TEXT

-

Autres

Autres - Texte

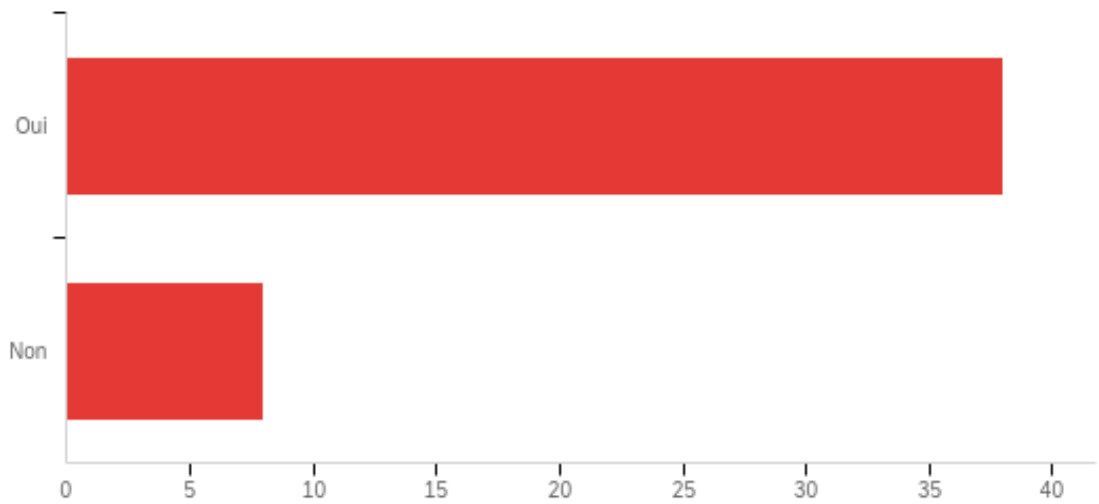
Q4 - Quel est votre revenu annuel ?



#	Field	Minimum	Maximum	Mean	Std Deviation	Variance	Count
1	Quel est votre revenu annuel ?	1.00	11.00	3.37	2.36	5.58	46

#	Answer	%	Count
1	Moins de CHF 10'000	26.09%	12
2	CHF 10'000 - CHF 19'999	13.04%	6
3	CHF 20'000 - CHF 29'999	26.09%	12
4	CHF 30'000 - CHF 39'999	13.04%	6
5	CHF 40'000 - CHF 49'999	4.35%	2
6	CHF 50'000 - CHF 59'999	6.52%	3
7	CHF 60'000 - CHF 69'999	4.35%	2
8	CHF 70'000 - CHF 79'999	0.00%	0
9	CHF 80'000 - CHF 89'999	4.35%	2
10	CHF 90'000 - CHF 99'999	0.00%	0
11	CHF 100'000 - CHF 149'999	2.17%	1
12	Plus de CHF 150'000	0.00%	0
	Total	100%	46

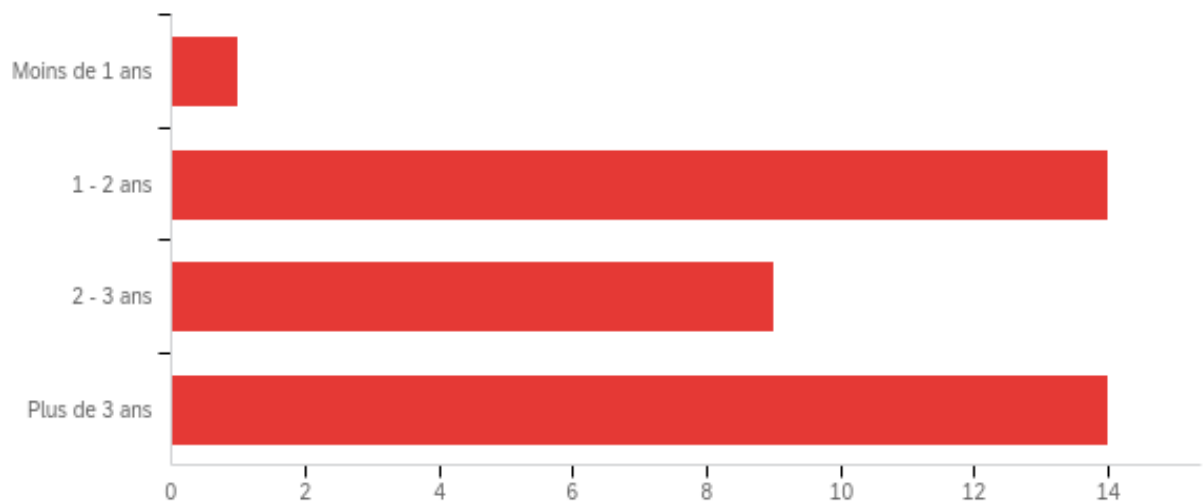
Q5 - Est-ce que tu pratiques une activité sportive de type fitness en salle ?



#	Field	Minimum	Maximum	Mean	Std Deviation	Variance	Count
1	Est-ce que tu pratiques une activité sportive de type fitness en salle ?	1.00	2.00	1.17	0.38	0.14	46

#	Answer	%	Count
1	Oui	82.61%	38
2	Non	17.39%	8
	Total	100%	46

Q5 - Depuis combien de temps pratiques-tu ?

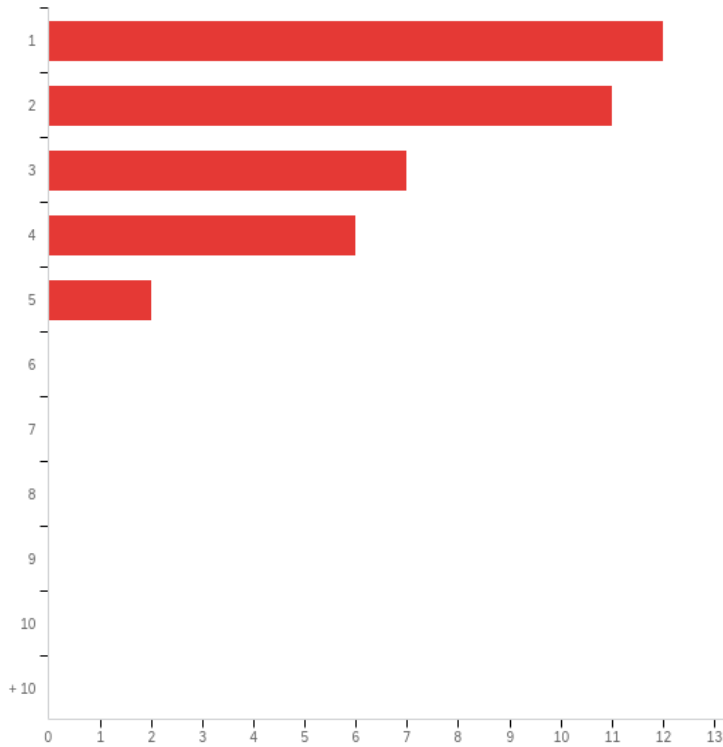


#	Field	Minimum	Maximum	Mean	Std Deviation	Variance	Count
1	Depuis combien de temps pratiques-tu ?	1.00	4.00	2.95	0.92	0.84	38

#	Answer	%	Count
1	Moins de 1 ans	2.63%	1
2	1 - 2 ans	36.84%	14
3	2 - 3 ans	23.68%	9
4	Plus de 3 ans	36.84%	14
	Total	100%	38

Q6 - Dans combien de fitness différents t'es-tu déjà inscrit ?



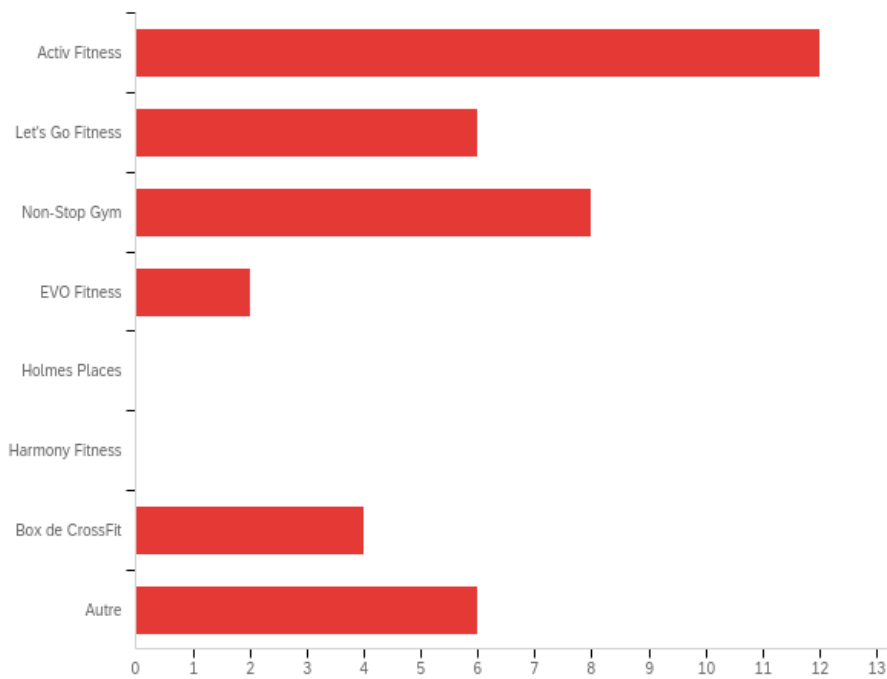


#	Field	Minimum	Maximum	Mean	Std Deviation	Variance	Count
1	Dans combien de fitness différents t'es-tu déjà inscrit ?	1.00	5.00	2.34	1.22	1.49	38

#	Answer	%	Count
1	1	31.58%	12
2	2	28.95%	11
3	3	18.42%	7
4	4	15.79%	6
5	5	5.26%	2

6	6	0.00%	0
7	7	0.00%	0
8	8	0.00%	0
9	9	0.00%	0
10	10	0.00%	0
11	+ 10	0.00%	0
	<b>Total</b>	<b>100%</b>	<b>38</b>

### Q7 - Dans quel fitness es-tu inscrit en ce moment?



#	Field	Minimum	Maximum	Mean	Std Deviation	Variance	Count
1	Dans quel fitness es-tu inscrit en ce moment? - Selected Choice	1.00	8.00	3.47	2.62	6.88	38

#	Answer	%	Count
1	Activ Fitness	31.58%	12
2	Let's Go Fitness	15.79%	6
3	Non-Stop Gym	21.05%	8
4	EVO Fitness	5.26%	2
5	Holmes Places	0.00%	0
6	Harmony Fitness	0.00%	0
7	Box de CrossFit	10.53%	4
8	Autre	15.79%	6
	Total	100%	38

#### Q7\_8\_TEXT - Autre

Autre - Texte

---

American Fitness

---

My Club Fitness

---

American Fitess

---

Garage gym

---

Gold gym

#### Q8 - Quel est le prix de ton abonnement à l'année (plus ou moins) ?

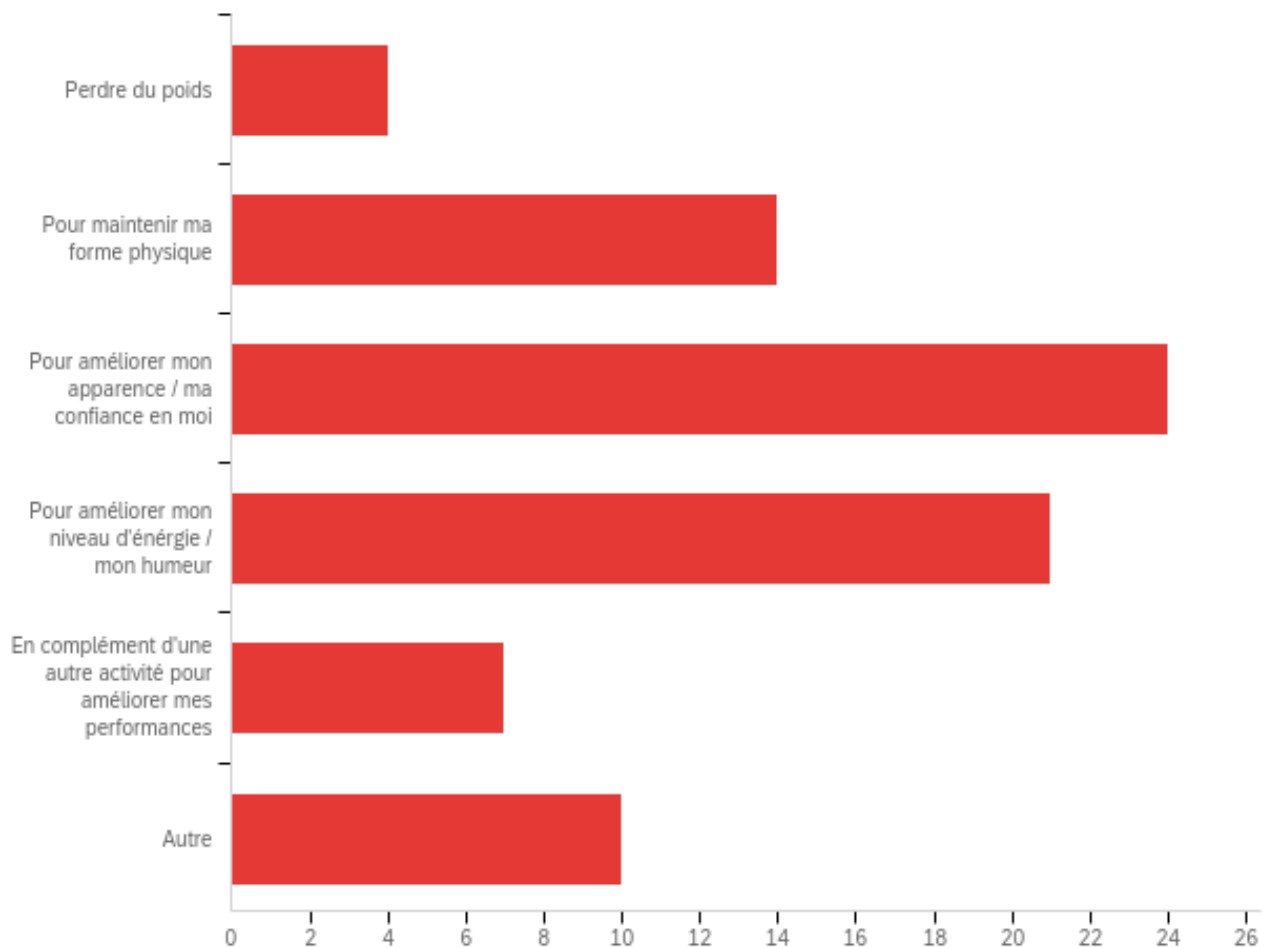
#	Field	Minimum	Maximum	Mean	Std Deviation	Variance	Count
---	-------	---------	---------	------	------------------	----------	-------

1	Coût abonnement annuel	0.00	2110.00	788.87	321.07	103086.17	38
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Q9 - Jusqu'à combien serais-tu prêt à payer (plus ou moins) ?

#	Field	Minimum	Maximum	Mean	Std Deviation	Variance	Count
1	Coût abonnement annuel	499.00	2506.00	1009.18	399.03	159223.52	38

Q10 - Pour quels raisons principales faites-vous du fitness?



#	Answer	%	Count
1	Perdre du poids	10.81%	4
2	Pour maintenir ma forme physique	37.84%	14
3	Pour améliorer mon apparence / ma confiance en moi	64.86%	24
4	Pour améliorer mon niveau d'énergie / mon humeur	56.76%	21
5	En complément d'une autre activité pour améliorer mes performances	18.92%	7
6	Autre	27.03%	10
	Total	100%	37

#### Q10\_6\_TEXT - Autre

Autre - Texte

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Voir des connaissances

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Dépassement de soi, défi

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Créer du lien social avec des gens

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Travail de force, explosivité

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Developper masse musculaire

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Compétition

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par plaisir

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Pour le défi

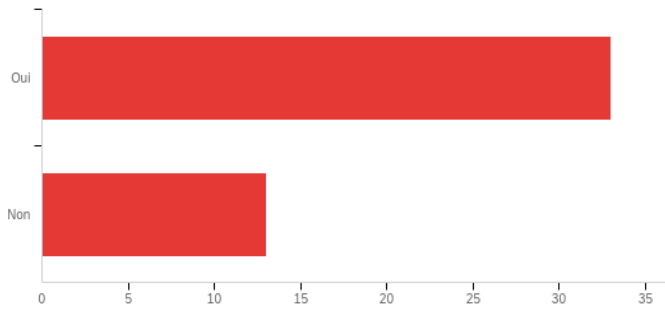
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gagner en force

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Vider la tête

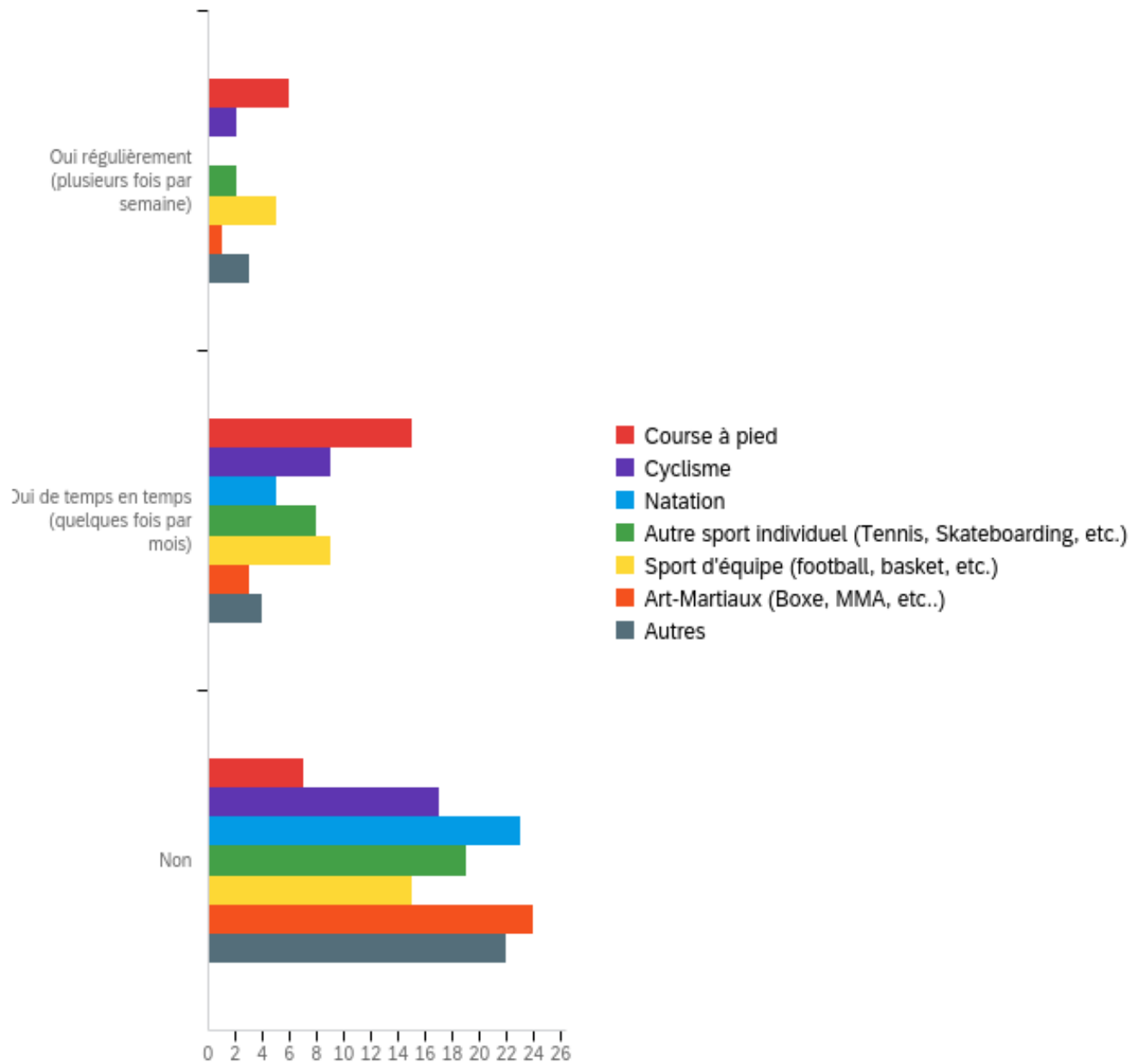
#### Q11 - Pratiques-tu une autre activité sportive ?



#	Field	Minimum	Maximum	Mean	Std Deviation	Variance	Count
1	Pratiques-tu une autre activité sportive ?	1.00	2.00	1.28	0.45	0.20	46

#	Answer	%	Count
1	Oui	71.74%	33
2	Non	28.26%	13
	Total	100%	46

Q12 - Pratiques-tu l'un des sports proposés ci-dessous ?



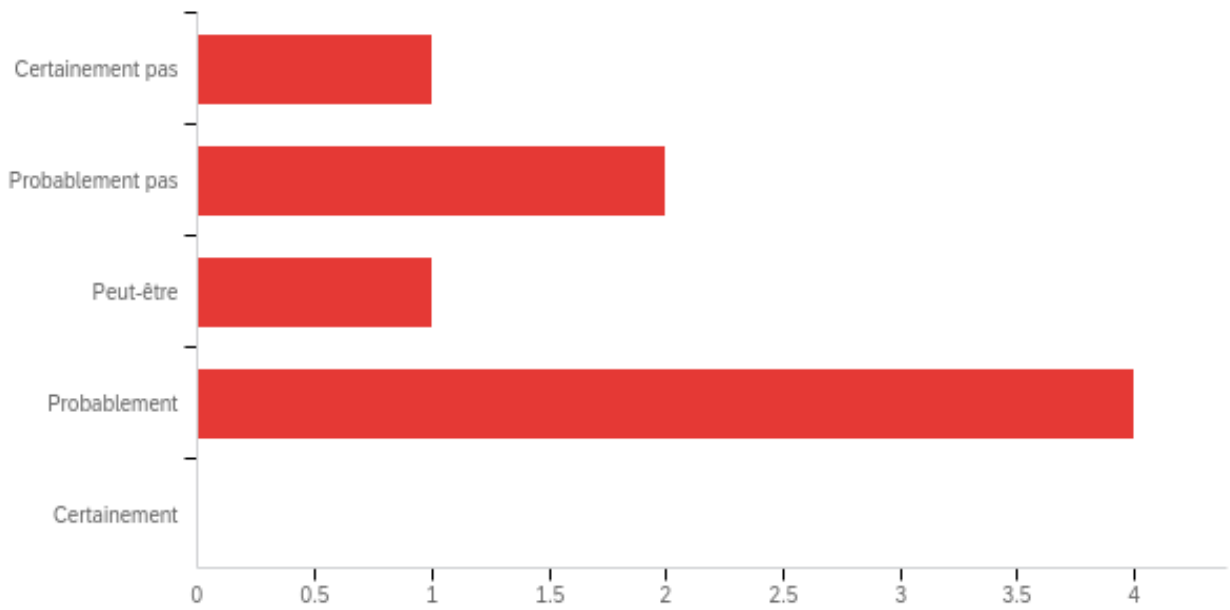
#	Field	Minimum	Maximum	Mean	Std Deviation	Variance	Count
6	Art-Martiaux (Boxe, MMA, etc..)	1.00	3.00	2.82	0.47	0.22	28
3	Natation	2.00	3.00	2.82	0.38	0.15	28
7	Autres	1.00	3.00	2.66	0.66	0.43	29

4	Autre sport individuel (Tennis, Skateboarding, etc.)	1.00	3.00	2.59	0.62	0.38	29
2	Cyclisme	1.00	3.00	2.54	0.63	0.39	28
5	Sport d'équipe (football, basket, etc.)	1.00	3.00	2.34	0.76	0.57	29
1	Course à pied	1.00	3.00	2.04	0.68	0.46	28

#	Question	Oui régulièrement (plusieurs fois par semaine)	Oui de temps en temps (quelques fois par mois)	Non	Total
1	Course à pied	21.43%	6 53.57%	15 25.00%	7 28
2	Cyclisme	7.14%	2 32.14%	9 60.71%	17 28
3	Natation	0.00%	0 17.86%	5 82.14%	23 28
4	Autre sport individuel (Tennis, Skateboarding, etc.)	6.90%	2 27.59%	8 65.52%	19 29
5	Sport d'équipe (football, basket, etc.)	17.24%	5 31.03%	9 51.72%	15 29
6	Art-Martiaux (Boxe, MMA, etc..)	3.57%	1 10.71%	3 85.71%	24 28
7	Autres	10.34%	3 13.79%	4 75.86%	22 29

Q13 - Est-ce que vous seriez intéressé par la pratique du fitness en complément de votre activité sportive actuelle ?





#	Field	Minimum	Maximum	Mean	Std Deviation	Variance	Count
1	Est-ce que vous seriez intéressé par la pratique du fitness en complément de votre activité sportive actuelle ?	1.00	4.00	3.00	1.12	1.25	8

#	Answer	%	Count
1	Certainement pas	12.50%	1
2	Probablement pas	25.00%	2
3	Peut-être	12.50%	1
4	Probablement	50.00%	4
5	Certainement	0.00%	0

Total

100%

8

Q14 - Quels sont les motifs qui vous dissuade de faire du fitness pour le moment ? (réponse facultative)

Quels sont les motifs qui vous dissuade de faire du fitness pour le moment ? (réponse facultative)

J'aime pas les gens dans les salles de fit

Coûts

Le manque de temps

Mes horaires de travail

Pas assez de temps de récupération si je l'ajoute à mon programme

J'aime pas les salles

Q15 - Quels sont pour vous les critères les plus importants lors que vous choisissez-votre club ? Juger les facteurs suivant de 0 à 5. (Si pas du tout pris en considération laissez 0).

#	Field	Minimum	Maximum	Mean	Std Deviation	Variance	Count
2	Distance du domicile	2.00	5.00	4.22	0.81	0.66	37
9	Zone poids libre	2.00	5.00	3.92	0.88	0.78	37
1	Prix	0.00	5.00	3.79	1.17	1.38	38
13	Espace à disposition lors de forte influence / Congestion	0.00	5.00	3.58	1.04	1.08	36
11	Zone Functional Training	1.00	5.00	3.45	1.10	1.22	33

12	Accès 24/24H	0.00	5.00	3.42	1.46	2.14	38
8	Ambiance de la salle	0.00	5.00	3.06	1.41	2.00	36
3	Attitude du staff	0.00	5.00	2.45	1.48	2.19	38
10	Zone Cardio	0.00	4.00	2.14	1.21	1.45	36
6	Programmes personnalisés	0.00	5.00	1.65	1.45	2.11	34
4	SPA & Zone de détente	0.00	4.00	1.55	0.92	0.85	33
5	Cours collectifs disponibles	0.00	5.00	1.22	1.22	1.48	32
7	Coaching individuel	0.00	4.00	1.16	1.20	1.44	32

Q16 - Les facteurs suivants doivent-ils être pris en considération par un club de sport pour être attrayant pour vous ? (Laissez 0 si ce n'est pas du tout important pour vous)

#	Field	Minimum	Maximum	Mean	Std Deviation	Variance	Count
3	Site internet	0.00	5.00	3.68	1.59	2.51	34
1	Présence sur les réseaux sociaux (Facebook, Instagram, etc...)	0.00	5.00	2.30	1.36	1.85	33
2	Interactivité sur les réseaux sociaux (Influenceurs, post régulariers)	0.00	5.00	2.06	1.22	1.50	32
4	Application mobile	0.00	5.00	1.91	1.28	1.65	32

5	Appareils de fitness connectés	0.00	5.00	1.14	1.11	1.22	29
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Q17 - Y a-t-il autre chose d'important que vous prenez en considération lorsque vous choisissez une salle de sport ? (réponse facultative)

Y a-t-il autre chose d'important que vous prenez en considération lorsque vous choisissez une salle de sport ? (réponse facultative)

L'espace disponible dans la salle pour se mouvoir et l'eclairage

Attitude des gens

Population de la salle de fitness, je préfère une salle qui a des valeurs sportives similaires à moi même

entretien de la salle, luminosité

La possibilité de se désabonner à tout moment, les horaires flexibles meme si pas 24h/24 pour aller tot le matin les weekend

La compétence des instructeurs dans une démarche de crossfit mais aussi dans les fitness que j'ai fréquenté, leur sympathie aussi

Les machines pour l'isolation

Propreté

Je fais du crossfit, ce qui est important c'est un bon coaching et une bonne ambiance dans la box

les machines pour travailler les muscles spécifiques

Une zone de machine avec poids libre

Propreté des lieux, machine à disposition

Zone de machine

non

Les different / nouveaux material pour les exercices et e-exercise les machines electric au lieu de poids normale

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Pour le crossfit organiser des choses pour le côté communauté

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activités extra: ex journée spéciale avec un challenge et une bouffe

## **Appendix 4 : Transcript of the interview with a gym owner**

Concerning your clientele, do you notice that one segment of the population, one age or one gender is more present than another in your fitness center?

The people who come to my gym are mostly aware that I emphasize weight training more than any other method, they know that they will have to go through the weights. I have nothing against cardio or other forms of training like functional training, it's just not my focus. It's not a wellness, here you do sports you are here to improve your physical condition. In terms of age I would say that the clients are quite mixed as far as men and women are concerned, an average age of 30 I would say, there are two thirds of men and one third of women. The world of bodybuilding often scares women. I think this is partly due to a certain misconception that women have about bodybuilding and especially about the hormonal system, they are afraid that by training like men they risk looking like them. It is important to reassure them that this is not how it works and that strength training will not give them a masculine physique that is disharmonious to the contrary. The bodybuilding aspect is rather masculine and can frighten women, which explains why they often prefer to take refuge in a club called "wellness" which is more feminine.

**You talk about Wellness and Fitness, what is the difference? How do you define yourself?**

Fitness in French refer to (gymnasium), others are wellness. In a wellness it is more cardio "aerobic" even if there are stations of bodybuilding, you will more easily find hammams, saunas, Jacuzzis, swimming pools of the things like that. What it is necessary to understand it is that that changed with the years, a mutation it is made. In the 60's and 70's, we were more into strength training than cardio, then in the 80's, there was aerobics and development of cardio, people said to themselves that they would rather do cardio to get back into shape by concentrating on cardiovascular/cardiorespiratory training in order to feel better and to lose weight. There are trends that change every 5-6 years that vary with fashion and the aesthetic criteria of celebrities for example.

**Do you notice differences in motivation and in the way of training between generations?**

Already from 14 to 20 years old individuals are growing. You have developed people, overweight people and frail people. It's always the same motivations but you already see three different profiles, those who want to lose weight, those who want to build muscle mass and those who already have a good stature but want to go for performance and have a really nice physique. The motivations do not change with the other generations. There are no major

differences in the way of training, it remains timeless, the differences in exercises are nuances but not fundamental changes. The clients over 45 years old more or less come for weight loss reasons however due to prolonged inactivity I would say.

**And then the functional training, we didn't talk about it a few years ago, you yourself added a dedicated area to your gym, isn't that a difference in itself in the ways of training ?**

Let's be clear, the basis is bodybuilding, you can't be strong in a sport without going through bodybuilding for me it's impossible. All elite athletes go through weight training. That said, I must admit that functional training is interesting. The advantage of functional training is that it allows you to put in a single session, strength, endurance, synchronization, balance, reactivity, it is hyper complete. However, I have my reservations about certain forms such as CrossFit, which in my opinion is dangerous, the staff is not qualified to teach certain weightlifting movements and this is dangerous. But apart from that without the weightlifting movements it is an interesting method indeed but not my specialty.

**Do you think that clients aged 25-30 or younger have special requirements for sports facilities?**

No it really depends on the profile I think, those who want to focus on the weight training aspect will look for a gym that has a lot of equipment with dedicated machines and free weights for example. For me, the machines are important for beginners to help them understand the movement that they can then perform with free weights. Even if they don't realize the exact infrastructure they want, I think it's the duty of the staff including myself to explain that. The follow-up is important, when a client comes to my gym we do a briefing and according to that and his objectives I will make sure to bring him little by little to his goal.

**Do you think that young people are still interested in coaching?**

It's not a question of interest, it's a financial question, coaching is a luxury and the young people who can afford it often have a well-to-do family. However, I find that in fitness chains such as Activ for example, the staff is not attentive enough to the client and this leads to a desertion of the clients who do not feel supported in their practice. Here, there is anyway a follow-up of the customers and free coaching hours included in the subscription. Our principle is that if you don't know how to train we will teach you so that you don't get hurt. You can be sure that if a client gets injured you will never see him again.

**Do you consider this follow-up aspect to be important for the business?**

Most fitness companies are money machines, they don't care about the customers, they have 40% of the subscription dormant and make money on that. That's not my philosophy, the first three months are important because that's when clients develop the first results. That's when you have to give the most follow-up, as a general rule if the customer is coming regularly 2-3 times a week in the first three months, he will follow.

**How can we best motivate people to participate and come more in this case?**

I think that there is no miracle method, the motivation must come from the person, we can't control that. I think that explaining to people what they have to do in a transparent way to expect results is the basis and to give them a correct follow-up.

**On average, how many times a week do your clients train?**

2-3 times a week on average and you have quite a few people who come 4-5 who are very invested.

**What do you think of CrossFit and other group classes for that matter?**

Group classes are primarily for people who can't take care of themselves I think or who don't have the motivation. Often also who can't afford to have a coach for themselves. It's easier to have someone who thinks about the programming and tells you what to do without thinking. We have a few group classes here, mostly cardio oriented, the kind of workouts that would be very hard to do alone due to lack of motivation or without a leader to push the motivation. You have clubs that have been built on that, personally I lost money on that because of the licenses and the coaches' salaries that cost me more than it brought me benefits. The problem with group classes is that they are not flexible, if a client wants to do their physical activity at a time other than the scheduled time, we will not be able to satisfy their request.

CrossFit is different, it's about pushing yourself, while bodybuilding is more personal. We are in a sedentary society, people feel the need to surpass themselves, it's like for the spartan races, there is indeed a collective side that you don't find in weight training, you will always have people around you to motivate you. It's complicated to create that kind of atmosphere in a classical facility. You have people going from CrossFit to weight training and back from weight training to CrossFit. I think the main flaw is the coaching and that there are a lot of injuries that I think. The coaches are under trained. What is important is the teacher, we have 6 hours of functional training classes and in group classes there are always people. For my next fitness club, I was thinking about doing it more often.

**What do you think of the business model entirely focused on the group class?**



For me the best model is the one where you can make people practice sports safely without risk of injury and if possible, in certain time slots under the supervision of a staff. After that there will always be a risk of injury in all cases, for example in the time slots where there is no staff, but you should always focus on giving people a good base to avoid injuries.

**Do you think the fitness industry is easy to get into?**

There is room for everyone and for different concepts indeed, it is just necessary that not everyone does the same things at the risk of creating a saturation, you can get out of it by specializing on a form of sport. That's what I do here with my focus on bodybuilding, I've been doing it for 18 years and I'm going to expand. If I look at the market, there are roughly 70 fitness centers in Geneva, 65 that I would call Wellness and only 5 fitness centers like mine.

**How do you explain the success of Non-Stop Gym, which did not exist 5-6 years ago and which now has about twenty clubs in French-speaking Switzerland?**

They arrived with a concept: open 24 hours a day, less than CHF 50.00 per month. Their strong point is also the proximity, simple concept, they have well positioned their club.

**Are there any trends in the industry that you have noticed that you should take into account?**

The 24 hours a day! It saved me... I went through a bad period for business a few years ago. There was a lot of work going on in the fitness building and it impacted the environment of the gym, it lasted almost a year and I lost 200 clients at the same time Non-Stop Gym had just arrived and was taking a lot of clients. The situation was critical, I sincerely thought that I was going to have to close permanently so we tried 24 hours a day and I recovered the 200 clients in 8 months despite a consequent cost in infrastructure. People are increasingly looking for an environment without constraints, you want to offer something you have to minimize the constraints, this is also why I removed the automatic renewals of subscriptions, you are not a prisoner of your contract, you do not give news after one month at the end of your contract we file your file no worries. The client must feel free to come and go whenever he wants. Even if the client is going to come all the time at the same time, for example every day at 5pm, he likes to know that if he wants to come one morning like at 6am or before he can.

**Why don't all fitness centers work 24 hours a day if it's so effective?**

Some fitness centers have made it a policy to always have a member of the front desk staff so that you are always under someone's supervision. Even if they don't care about the customer because the staff members are understaffed and change regularly to be efficient, it's more in

fashion because we are expensive, we justify it by the staff. I'm one of the only ones who does reception and 24 hours a day.

**What do you think about this aspect of not really paying attention to the customers and finally making profit on inactive gym members where customers pay but don't come to train? Is this the only profitable business model?**

I'll be honest, we all have inactive gym members, people who pay but never come and no matter what you do, you can't motivate people too much. We know very well that it's already a lost customer if it's an inactive one, yes it brings you CHF 600-700 but it's not going to renew, but we try to motivate the best we can. Take Non-Stop Gym, out of 10,000 clients, 70% are inactive. Harmony 9 clubs, 12'000 members, 15 million turnovers, it costs CHF1700 per year, there will always be people. Holmes Places is CHF 2500 of annual subscription and you have 55% of cancellations per year but you will always have people, it is supposed to be luxury but it would seem from the feedback I have that it is not even those who maintain the equipment and the place at best. You have to look at it this way, there is no business model that works better than another, it's a question of scale. I think I have less sleepers than average with a 60-70% renew of the subscription of my members, I think it's because I am a gym that offers a unique value proposition with a unique positioning. Take, for example, Body-Performance which is a club a bit like me in terms of services but it's a bit more expensive, with a bit less equipment, not as big and no 24 hour access but it works well. Why? It's well maintained, it's nice, it's a neighborhood club, the locals walk there easily. That's why the big chains work, the clubs are well positioned, but when you're looking for something specific, yes, you're going to have to move a little more if you're demanding. People in rural areas are going to be willing to move a little more I think but in the city it's important that variable, it's much more sensitive. It's sad to see that unfortunately people are looking less and less at the quality and more at the distance and the price, and this at the risk of being disappointed and not coming back to a gym. It's hard to get people to move and realize the quality of what they could have if they moved more.

**Is it complicated to open a new fitness center?**

Finding an investor is still very complicated, despite the fact that you have 10% of the population who do fitness and that you have more and more gyms, investors are cautious. The Covid did not help, but apart from that, a fitness center is an expensive investment. In the CHF 800'000 in total is that for the initial investment after you have the salaries to pay and no customers yet so you need a working capital at the beginning, I would raise the total to CHF 1'500'000.

**What do you think of unmanned fitness centers like Evo Fitness in Switzerland?**

It's interesting that it works, but as I said, there will always be people coming and going, there is no one business model that works better than another. However, tell you that I have had the club for 18 years and tell you that it already existed before, it has existed for 49 years... it has evolved according to the trends, it was not created from the start like an Evo or a Non-Stop and what happens perhaps is that you have to know how to adapt to the market changes without losing your differentiation. I have kept members of the clientele who have been there for more than 20 years before me, that's to say.

**What do you think about digital marketing, social networks or other to be competitive?**

Look I don't use it much but I have to admit that yeah it helps. I'll tell you a story. A few years ago I made a mistake with Facebook Ad instead of putting CHF 50.00 in ads I put CHF 500.00 or something like that, I never had so many registrations so yes it was clearly profitable. I regularly do small campaigns to improve my visibility, the more people think of you the more they will come to you. I've done all the advertising media, Facebook works really well. I am less comfortable with Instagram. The last advertising campaign I did with a budget of CHF 250, the result: 10 contracts in one day.

**What do you think about influencers, do they speak to you?**

Not especially to be honest I'm not sure that it brings more people into a club, they mostly advertise for themselves. I'd have to get a staff member who works here to do that to see what it does but I don't know anyone so I don't know to be honest.

**Do you think fitness clients are loyal to their clubs?**

In any case with us as I told you with our renewal rate and our long time subscribers, the customers are rather faithful. When they leave, it's usually for family or professional reasons or a change of sport or activity, but change of gym... quite rare.

**And the others you think are the same?**

No, I think in all sincerity that we are better than the others, we have this social family side, we are not a small family club, we are a big family club with many possibilities. This is my personal opinion, but I think that our staff is more attentive and is always there when needed to assist. I am one of the few fitness where when you go you can talk directly with the boss. In the fitness chains, the staff doesn't listen to you they don't care, if you have a problem, you don't have the boss to solve your problem. I had a staff member who wasn't particularly socially adept, that made me lose customers I can tell you. I have a customer contact that is not replicable by others. You can have a worse than average infrastructure if your atmosphere is good you will

want to come. I think that's why we also have a more regular and loyal clientele than the average. The idea is that when the staff is there, it's proactive, there's no point in having staff for staff's sake if they're not there to really help. The number of people who come to the reception just to talk is impressive. In the next fitness center, we have planned a relaxation lounge area with a vending machine at the entrance so that people can chat quietly

**Despite the fact that you can't motivate people to do sports, do you still consider that the fitness industry has a public health role to play?**

Yes, it is. I find that we live in a phenomenon of hypocrisy where we try to convince people, especially overweight people of the obesity type, that they must accept themselves when it is dangerous for their health. We are mainly for health promotion. We focus on bodybuilding but it is above all a question of health, I think it is the best method to train in this way but after there is no miracle method, we must not forget the nutritional aspect and we give two or three pieces of advice when we can, but this is difficult, unfortunately it is not our specialty. We have very good coaches who take care of the diet aspect which is just as important as the physical activity but that's another story, they do the diet we did the sport. The overall idea is to bring people in a positive feedback loop, by bringing them little by little to see progress and make them understand that if they stop they will regress, so after they are used to it if they stop doing sports they will feel bad and it becomes more painful for them not to do sports than to do them so it's good for them in the end. It's about establishing a healthy lifestyle. We should teach people to move again, doctors should insist people to do sports and especially at school put more sports options, diet classes are important to avoid many things, cholesterol, diabetes, back and muscle problems. So to finish, yes we are actors but we have a very limited reach, we need policies at the state level to accentuate health promotion.

## **Appendix 5 : Transcript of the interview with a personal coach and social media influencer**

**Does one segment of the population use your services more than another (gender/age)?**

I have a little bit of everything from 14 to 70 years old, the majority to overall under 30 years old. I have people who are just starting out in the sport or people who want to move up to a higher level. I don't have a specific target audience but it is true that I have a female audience. I didn't want to specialize on a particular group, what I'm looking for is that the person can reach a better level and/or their goal. I don't discriminate. I would say that what defines the people who use my services is more in the profile of the personality, it's people extremely motivated to reach their goal but as far as the proportion between the sexes is concerned I would say 70% women and 30% men in my clients.

**What are the motivations that vary between men and women?**

Less and less I find. I am of the opinion that a woman can train in the same way as a man and vice versa. So I attract this kind of people. But I do have one thing that keeps coming back and I think it will keep coming back: weight loss, 90% of the time that's what comes back. But I have more and more girls who want to build strength, who want to build muscle mass. The goals tend to become more similar between men and women.

**Do you notice a difference in the way of training between the generations or between the sexes?**

Yes, a little, the older clients are more comfortable and the young ones are more hotheaded. After that, it depends on the profile, you always have people who will feel guilty if they don't train for a few days, like on vacation, and people who are much more relaxed. After that I would say that I feel a little more involvement from men than women, all the guys I have in coaching are very regular on their assessment, on their way of communicating with me on their involvement in coaching. With women it's much more random, you have girls who are very involved and almost more than some guys and others you have online coaching over three months and no news over the three months.

**What do you think about group fitness and CrossFit, is it appealing to young people?**

I used to do CrossFit but not anymore. I think that's something that's really appreciated in fitness. You have the group and the feeling of belonging to a group, which you don't find in fitness. For example, I teach a group class in a gym and your group of people who always

come to the class I do at 7:00 in the morning, three times a week, it's always the same people. They always know it's going to be a hard workout and yet they always come back, maybe that's why they come. It's a really unique atmosphere, nobody forgets each other's birthdays for example, people exchange gifts, it's like belonging to a group. I don't think it's a fashion and I don't think it's temporary, I think it fits some people and it doesn't fit others who want to do their training in their corner. But for some people that's how they're motivated to come and they wouldn't see themselves doing anything else. I think that LesMills classes for example are more likely to disappear than CrossFit, because it is less attractive for the future generations.

**Are there any trends in the industry that you've noticed that you think are important to consider?**

You don't see a gym opening now without a functional training area, just that. For women I have seen an evolution in fitness in the sense that before it was really a fashion to be skinny and now it's becoming more and more democratized to do weight training to get in shape. Well, there is still a large part of women who don't want to work on their upper body because of a false preconception of sport.

**If you were to open a fitness business, apart from the financial aspect, what do you think is the most important?**

You know me from the new generation, I'm very focused on the design of the place. We are on the new generations where there are more and more things happening on social networks so if I had to open a club, I would want it to be in terms of design attractive for sharing content on social networks. It's silly, but the lighting for example, it makes a difference. Mirrors tend to disappear in CrossFit gyms but if you want to open a gym that works on social networks, you need mirrors. Functional equipment as well, that's what's growing the most. It seems like you have less and less machines, people are moving more and more towards functional exercises so maybe a little less machine.

**How would you create loyalty in the fitness industry for customers?**

For me it comes from the staff mainly. I felt it very strongly when I worked in a gym where the atmosphere with the staff was so good that it got to the point where clients came to do their work out and came back during the day to drink coffees with the staff. It was a fitness that was more than a fitness, you came back because you had an atmosphere. The fitness was in Gland, you had people who lived in Geneva, worked in Geneva but who came to Gland just for this fitness and its atmosphere. It was really the team at the reception that made the clients stay. We really made sure that there was life in this fitness center. People would come in on Sundays to have a coffee with us and the young people would come back all the time and you

could clearly feel the loyalty. In terms of age, you had everything, in the morning more older people, in the evening mainly young people. But now, it is on the decline, the team has changed, I myself left, the atmosphere is a little less good. There were also group classes but I don't think that was the thing that made it work so well. The group classes, on the other hand, are sure to bring people in as soon as you manage to create this group spirit that we were talking about with CrossFit.

**Do you think you have a public health role to play?**

Yes, a little bit. Especially since I'm very present on social networks. I'm supposed to reflect a healthy lifestyle I think. I advocate eating with pleasure but well and balanced, I'm not for restrictive diets. I'm not into restrictive diets. I'm sometimes afraid that people will see me eating unhealthy things when I go out for example. I can't see myself living without training on a daily basis, it's my way of life and it's a priority for me. For nutrition it's sometimes a little more complicated and I tell myself that it's there that I have to put the effort.

**What do you think about online coaching?**

It depends on what you mean by online. I do online programming not live coaching via video conference or anything like that. I send a plan, we're in contact on WhatsApp and we do regular reviews. As for online courses like video coaching, I never wanted to develop that, honestly it doesn't attract me more than that. I wouldn't feel right doing coaching in this way behind a screen. In my opinion, it was a temporary thing related to Covid. It was a necessity because of the confinement and the impossibility of having direct contact. The remote monitoring on the other hand comes from before the Covid and I think it will remain. I have 0 requests for this kind of service in video.

**How do you explain your success on social networks?**

I don't consider it a success myself. I feel like I didn't do anything for it. I've been sharing on the networks for a while now, I invest time and I think that my authenticity, showing my daily life without any filter and especially the fact that I'm reachable, I try to answer everyone, show kindness and encourage people, for me that's what worked for me. I think I've developed a likability capital, it has an impact on the potential of attachment of the audience.

**Do you think your page helps people participate in sports more?**

I'm trying to give people a sense of balance. I went through phases of eating disorders myself. You don't have to be extreme, you can have deviations sometimes, but you have to have a healthy lifestyle in general and that's what I'm trying to promote. Encourage people, tell them that even if they already do sports once a week, it's good.

### **What is your audience on social networks?**

Totally mixed, like 49% men and 51% women

### **What kind of feedback do you get from your audience on the networks about what you do?**

A lot of people tell me that my content has helped them to get motivated to start the sport again and I try to make myself as available as possible to help and encourage, to give little advice to help people. I was well helped when I started so I also consider that now if people need a hand I can give a little help to help them get started.

### **Is social networking important to you in a perspective of marketing?**

The influencer market is amazing, I get 100% of my coaching from it, I can live off of Instagram alone so yes for an individual coach. For fitness, it's different, people choose their gym on proximity, I think. Investing in partnerships with influencers I don't think it matters for a fitness. I think that even if a gym is great, super beautiful and I see an influencer advertising it if it's 30 minutes away from my house, I won't go there. The only place where I go is the CrossFit gym where there is my coach because there is my coach and my team and we train together otherwise the gym itself is not great, dust everywhere, it is not clean but I go there because there is my coach. I think the gym I go to benefits a little bit from the visibility I bring when I publish content but I don't know how much impact it has. Proximity is still the priority, but if the fitness centers are at equal distance and you have the choice, maybe it helps to differentiate. But I know that on a small scale, yes, there are people who come to Non-Stop because they saw that I was working there and that I spoke well of it. Influence marketing is still something to consider.

### **Do you think customers are loyal to their fitness brand?**

I would say that yes, mainly by habits, people tend to stay in the chain they knew in the past if they did not have bad experiences. But not so easy for Activ Fitness (the biggest fitness chains), Let's Go for example does things that the others don't do, especially in terms of group classes. If that's what you want, you'll tend to stay with them because they have a lot of group classes.

### **What do you think about technology in general and mobile apps in the fitness industry?**

I don't use it personally. But afterwards from fitness companies I don't think it's relevant. Users will turn to apps made by influencers or celebrities or at least by companies that do just that. I don't know anyone who uses the apps developed by the fitness centers themselves to be



honest. Most of the young people who take online programs are made by influencers etc. I don't think it's relevant. Doing collaborations maybe would make sense. But it's a lot of money for not much to develop. Then for tracking you already have stuff on Apple Watch like that. I've worked for several brands that had apps, they never told us to put them forward, I never even downloaded them while I was working for them.

### **What do you think about unstaffed club?**

Staffing is expensive, it's going to disappear more and more. That's pretty much what Non-Stop is already doing, with some small presence hours and where they are smart is that they leave very low rents for personal trainers and a lot of benefits for personal trainers. You have a semblance of presence; you give the impression that there is always staff but in fact it's the individual trainings and people feel reassured but at the same time the fitness doesn't pay for the presence. However I tell you I wouldn't go to a gym where there is no staff, I would find it very cold. Let's take Non-Stop Gym for example, it's very simple but I already told them, adding a coffee machine with two three chairs at the entrance, it would change the general atmosphere and dynamic of the facility. A fitness center without staff is a fitness center without atmosphere and as soon as you have a fitness center that is about the same distance away, you change, you don't have any attachment to the gym, there is nothing that is created between you and the place. Yes, there are people who come just to train and who don't care about people, but I need this social link. I have a training center near my house that is very full but the atmosphere is not great, I could be there in 15 minutes whereas coming to Geneva to go to the gym where there is my coach for 45 minutes, well on the weekend I prefer to come to Geneva, that's to say. People who know what to do, it's good there will be a market for this kind of gym. But often people who have just arrived in a gym and who have a briefing at the beginning don't have a clue, you often have lost people but yes a little less young people.

### **Somethings to add from your side about fitness in general?**

On social networks unfortunately there is a lot of false information or things that are not authentic and I deplore this. Unqualified people giving advice or whatever. Knowledge and popularity don't mean much anymore, a person who has a big fan base will tell an absolute truth anyway, while when you have less followers, you have less credibility and I think it's a pity but hey. It engages people to work out sometimes but in an unhealthy way and develop eating disorders, one out of every two girls I coach has an eating disorder, it's often related to social media. I think it's a double-edged sword.