

Indoor Rowing Health & Fitness Market Segmentation

March 2017



BRITISH ROWING

Background and objectives

- British Rowing want to take a consumer focused approach to understanding the current and potential indoor rowing market
- Through understanding the demographics, attitudes, motivations and barriers towards sport/fitness and indoor rowing specifically, British Rowing seek to:
 1. **Grow the number of indoor rowers** within 5 years
 2. **Unite the indoor rowing industry** (across commercial equipment manufacturers, health and fitness operators, fitness professionals and other suppliers)
 3. **Reposition indoor rowing as a key part of the sport**, so that every indoor rower identifies themselves as a rower
- Market segmentation will be used to inform and support the development of products, activities and innovations that improve the indoor rowing experience and overcome barriers to participation



Research objectives and methodology

Overall, to understand and segment prospective and current indoor rowers, bringing them to life as pen portraits and ultimately, identifying the biggest opportunities to double participation in the next 5 years

Segment current and prospective indoor rowers

Identify biggest opportunities to drive participation in indoor rowing

Create clear and compelling segment pen portraits

To achieve these aims, we used a mixed methodology:

Qualitative Expert Interviews and BRIC* Intercepts
(Dec '16)

Quantitative online survey
(Dec '16-Jan '17)

Qualitative Activation workshops
(Feb-March '17)

Who the research spoke to

Qualitative Expert Interviews and BRIC Intercepts
(Dec '16)



Sample definition
Expert interviews with indoor rowing service providers and partners (n=8)

Intercepts with BRIC* 2016 event attendees (n=27)



Quantitative online survey
(Dec '16-Jan'17)



Sample definition
16-64s in England, who have exercised in the last 3 months, are a current/former gym/leisure centre member/attend(ed) pay as you go classes and don't reject using an indoor rowing machine

N=501
Panel sample completes



N=148
BRIC attendee completes



Qualitative Activation workshops
(Feb-March '17)



Sample definition
Activation workshops with 3x opportunity segments (n=6-8 per group): Fitness Fanatics, Routine Driven and Socially Motivated

Fitness Fanatics

Routine Driven

Socially Motivated

The opportunity



- There are an estimated **1.3m indoor rowers** in England; a larger participant base than APS data would suggest (~170k), driven by:
 - People using rowing machines as part of a workout but **not considering themselves 'rowers'**
 - The majority of indoor rowers using a machine for **up to 30 minutes** in a session, thus not qualifying for the historic APS definition
- The opportunity for indoor rowing is vast; **15.8m would consider using a rowing machine**, 13.3m of whom have used one before
- A **good infrastructure** for growing the sport is already in place, **79% have access** to a rowing machine; but despite high access, only around **1 in 4** gym goers are indoor rowing
- Challenge is to **make indoor rowing 'stickier'**, encouraging trial and continued use of rowing machines over competitor equipment or provision
- By looking at the different attitudes and motivations for exercise in general, **six segments** have been identified in this research pulled apart by their **level of motivation to exercise, how they are motivated** (by themselves or others) and **competitiveness**
- As this report will show, there are a **number of engagement opportunities** for getting more people into indoor rowing
 - However, it is not a 'one size fits all' approach and consideration is needed for how best to **prioritise** and **target** different segments

What we can learn about indoor rowing from current participants



Only **1 in 4** indoor rowers **identify themselves as 'rowers'**; this increases among those who use the machines for a **greater amount of time** – challenge is to get people rowing for longer



4 in 5 indoor rowers spend **less than 30 minutes** on a machine in a typical session; need to showcase the **benefits** and **variety** of workouts available to encourage greater usage



1 in 3 indoor rowers use the machine as the main part of their workout; majority use it to supplement a routine or for warming up – need to show how indoor rowing can be a **more focal part of routines**



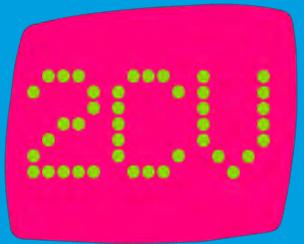
3 main reasons for using a rowing machine:

- 1) To improve **fitness / stamina**
- 2) To increase **upper body strength**
- 3) To improve **general health / wellbeing**

Need to dial-up the '**full body workout**' message to potential audiences as a 'hook' for indoor rowing

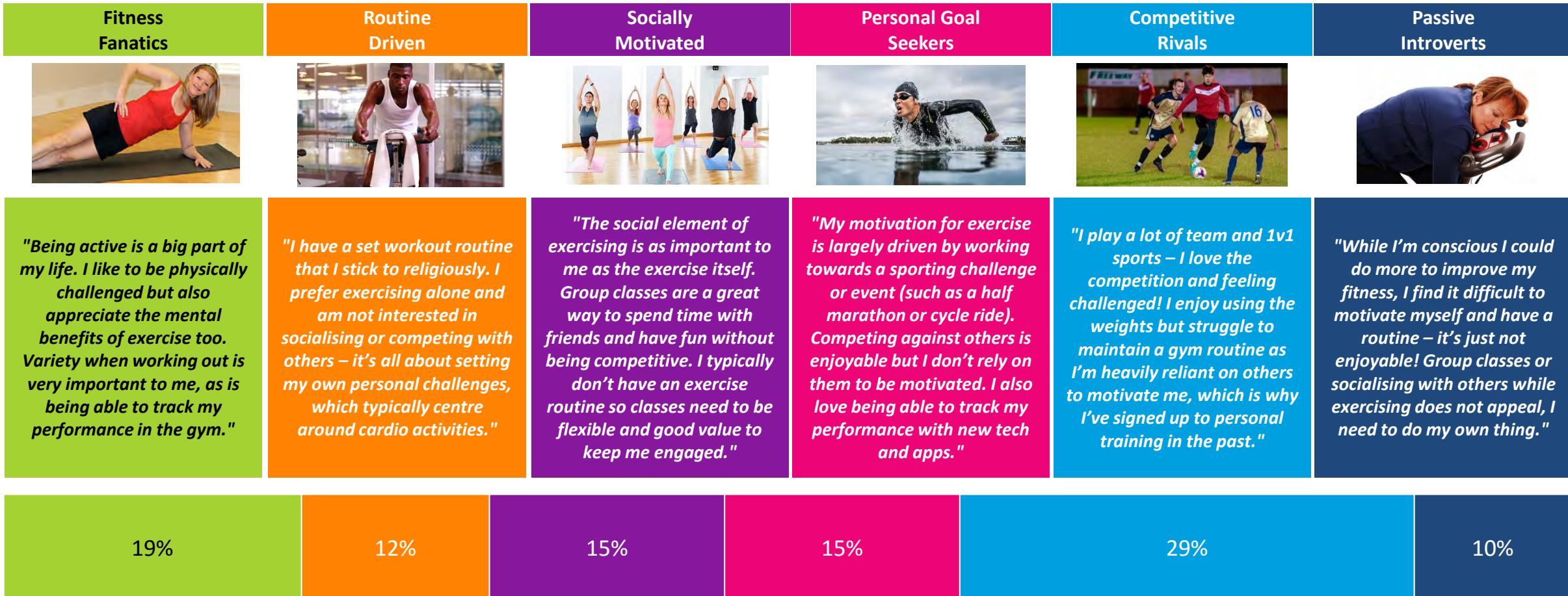
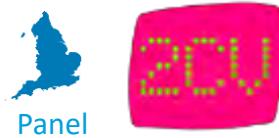


1 in 2 indoor rowers are **self-taught**; opportunity to **upskill personal trainers and gym staff** to educate rowers (and potential rowers) in how to use the machines correctly



Market segments

Segment profiles and their relative sizes



A1. On the whole, how do you feel about exercise? C2. In general, how much interest do you have in rowing (outdoor or indoor) as a sport?

Base: Fitness Fanatics (95), Set Routiners (60), Personal Goal Seekers (74), Competitive Rivals (145), Socially Motivated (77), Passive Introverts (50)

Overview of segment profiles

Higher priority segments

Fitness Fanatics	Routine Driven	Socially Motivated	Personal Goal Seekers	Competitive Rivals	Passive Introverts
					
Slight female skew	Slight male skew	Strong female skew	No gender skew	Slight male skew	Slight female skew
Slight skew to over 35s	Heavy skew to over 35s	Slight skew to over 35s	Higher proportion of 16-24s than other segments	Higher proportion of 16-34s than other segments	Heavy skew to over 35s
Exercise frequency (vs. other segments): High	Exercise frequency (vs. other segments): Average	Exercise frequency (vs. other segments): Low	Exercise frequency (vs. other segments): High	Exercise frequency (vs. other segments): Average	Exercise frequency (vs. other segments): Low
Rank 3rd in terms of current rowing machine usage	Rank 1st in terms of current rowing machine usage	Rank 4th in terms of current rowing machine usage	Rank 6th in terms of current rowing machine usage	Rank 5th in terms of current rowing machine usage	Rank 2nd in terms of current rowing machine usage
Access to rowing machines (vs other segments): High	Access to rowing machines (vs other segments): High	Access to rowing machines (vs other segments): Low	Access to rowing machines (vs other segments): Low	Access to rowing machines (vs other segments): Low	Access to rowing machines (vs other segments): Average

What opportunity do the different segments offer?



Higher priority segments

Fitness Fanatics	Routine Driven	Socially Motivated	Personal Goal Seekers	Competitive Rivals	Passive Introverts
 <p>19% 3m</p>	 <p>12% 2m</p>	 <p>15% 2.4m</p>	 <p>15% 2.3m</p>	 <p>29% 4.6m</p>	 <p>10% 1.6m</p>
What makes them an opportunity? <p><i>Second largest segment overall and extremely engaged with fitness/ exercise. Regularly attend the gym and classes meaning access to machines is high. Indoor rowing can provide variety to their workouts. Also love to track their activity.</i></p> Challenges to overcome when targeting <p><i>Carry out a lot of other exercise activities (which are currently preferred). Need to be convinced of indoor rowing's benefits and potential to be competitive. Higher availability of machines needed.</i></p>	What makes them an opportunity? <p><i>Most likely segment to be indoor rowing already, enjoy their cardio work and also have highest access and consideration to use a rowing machine in the future.</i></p> Challenges to overcome when targeting <p><i>They like other forms of exercise and are wedded to pre-existing routines; challenge is to ensure indoor rowing is considered as part of their regime and via a trusted source (e.g. gym staff).</i></p>	What makes them an opportunity? <p><i>Already attending fitness classes so a potential prime target for group indoor rowing sessions.</i></p> Challenges to overcome when targeting <p><i>Like to exercise with friends but not competitively. Currently have lower access and lower confidence on the rowing machine which would need addressing. Less interested in working out at the gym, therefore would need to be targeted within classes or socially driven provision.</i></p>	What makes them an opportunity? <p><i>Frequent exercises who are self-motivated (i.e. don't rely on others) and love a physical challenge. With the right offer could become highly engaged with indoor rowing. Also love to track their performance.</i></p> Challenges to overcome when targeting <p><i>Less likely than SRS and MFF to have used a rowing machine in the past so rowing confidence is lower. Need to overcome 'boring' perception by showing how it can be social, competitive and trackable.</i></p>	What makes them an opportunity? <p><i>Generally very sporty and have decent fitness levels. Like to compare their performance against others and track via apps / tech. Claim to be fairly confident with using a rowing machine.</i></p> Challenges to overcome when targeting <p><i>Less likely to have a gym membership so rowing machine access is lower. Reliant on others for their motivation therefore rowing needs to be showcased as a social and competitive sport.</i></p>	What makes them an opportunity? <p><i>While less motivated and active than the other segments they at least acknowledge they could do more! Like to work out alone so there could be a role for indoor rowing with this audience, possibly around weight loss messaging.</i></p> Challenges to overcome when targeting <p><i>More likely to be out of shape, therefore less motivated to exercise than other segments. Current fitness levels cited as a barrier, as is the perception of indoor rowing being 'boring'.</i></p>

All segments need to be taught the basics of indoor rowing



Taught the correct technique

- How to position themselves correctly on the machine
- What technique to use when rowing
- Delivered via a PT, member of gym staff, or technology to assess technique

Inductions don't really happen – when do we get the opportunity to learn?

Shown how to use the machine

- How to use the screen and programme settings
 - How to set programme based on my needs e.g. to reach a distance or calories burned goal
 - How to see when goal reached
- Interactive screen preferred

The instructors don't know how to use them! They never come over to help!

Told how it can work for me

- The unique benefits of indoor rowing!
e.g. all over body workout, efficient
- What programme I should use to reach my goals
- What resistance I need for my weight / height / goals
- How I can achieve my fitness targets through rowing e.g. lose body fat
- How this fits into my fitness routine

I need to know how the machine will fit in to my programme and what it will deliver

Introducing our Fitness Fanatics

"Being active is a big part of my life. I like to be physically challenged but also appreciate the mental benefits of exercise too. Variety when working out is very important to me, as is being able to track my performance in the gym"



MOTIVATIONS TO EXERCISE

To challenge myself

- o Pushing myself and seeing progress
- o Competing with myself and others

Mental benefits

- o To switch off and zone out
- o To relieve stress and feel good

Improving health and fitness

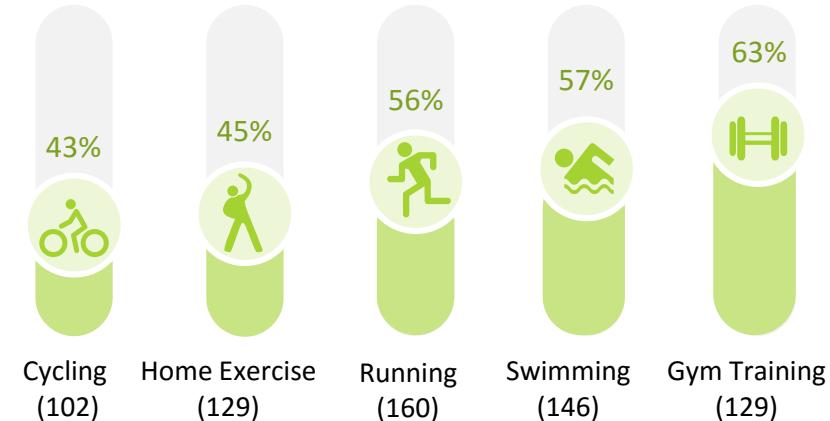
- o To prevent or treat health problems

FITNESS BEHAVIOURS

- They regularly exercise, taking part in lots of different sports & fitness activities
- They prefer to do it alone and they are most likely to belong to a gym
- More indoor rowers than average (17%) but mostly lapsed (69%)



TOP SPORTS PLAYED (PAST 3 MONTHS)



WHAT THEY WANT FROM FITNESS PROVISION

To get in the zone

Either to switch off or to get pumped up

To push themselves

e.g. set challenges or targets or ability matched sessions

Having variety in fitness activities

Trying new things

To track their performance & compete

e.g. seeing results such as calories burnt

PERCEPTIONS OF INDOOR ROWING

Aware that it delivers fitness benefits

Gives them some variety in their workouts

But unsure how to use the machine correctly or the best technique

Not clear how it delivers to their specific fitness needs/ goals

Don't know how to track their performance



Once taught the basics, there are further opportunities to engage our Fitness Fanatics



Indoor rowing challenges so they can push themselves

- On gym floor, drop in and compete
- Group or solo challenges
- Races, or challenges over time
- Leader boards in gym
- Ability to sync with friends and compete
- Attention grabbing challenges e.g. Row to France!
- Gamification of challenges e.g. row away from shark!
- Could include building up to rowing on water

Indoor rowing classes to create excitement and engagement

- Raise profile of rowing – make it cool!
- Spin or HIIT style classes
- Help them to get in the zone – motivational instructor, loud music
- Colourful equipment
- Ability matched sessions
- Leader board at front

Provision to help them 'zone-out'

- Virtual reality rowing e.g. rowing on water, races – so they can see where they are in race
- Position rowing machines to have a nice view

Tech and apps so they can track their performance

- Rowactiv, LiveRowing apps appealing
 - Technique videos
 - Syncing your phone/ current tech and monitor progress
 - Challenge/ programme/ intensity options
 - Share and compare
- Would also like:
 - To be able to sync with their training programme
 - To be able to sync with friends e.g. notification when friend rows to prompt me
 - Goal led e.g. calories burned
 - To be able to save results for ongoing tracking

Introducing our Routine Driven

"I have a set workout routine that I stick to religiously. I prefer exercising alone and am not interested in socialising or competing with others – it's all about setting my own personal challenges, which typically centre around cardio activities."



MOTIVATIONS TO EXERCISE

- Getting the job done
 - Fitness activities are part of my weekly schedule
 - It's about ticking it off the to-do list
- To challenge myself
 - Focusing on self-improvement
 - To get the most out of the session
- Improving health and fitness
 - Both physically and mentally

FITNESS AND INDOOR ROWING BEHAVIOURS

- They regularly exercise and like to follow a set fitness routine
- They prefer to do it alone, spending a lot of time in the gym
- The most likely to be indoor rowing currently (23%) with a large number of lapsed (65%)



WHAT THEY WANT FROM FITNESS PROVISION

A structured workout

So they know what needs doing to get the job done

Goals and challenges to achieve

Personal challenges to help maximise the session

A way to track their performance

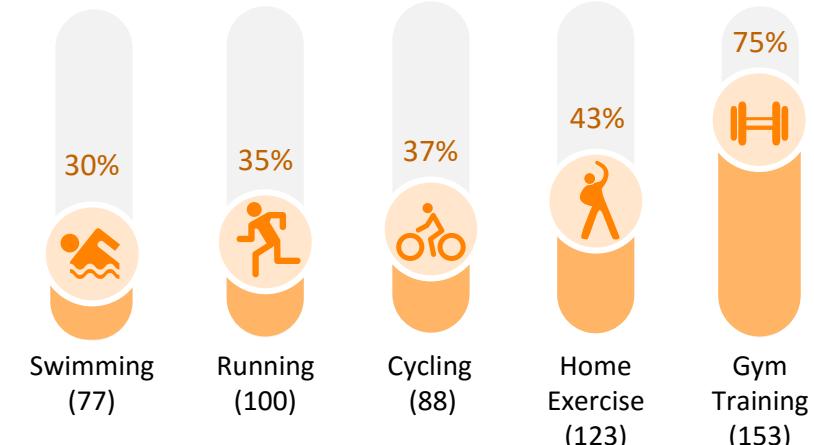
In-the-moment and end results to help push themselves

A way to get in the zone, undisturbed

e.g. not too many people so they can focus inward

Proportion
12%
Size
2m

TOP SPORTS PLAYED (PAST 3 MONTHS)



PERCEPTIONS OF INDOOR ROWING

You can challenge yourself

It relieves stress and provides an intense physical workout

You can control the workout and get in the zone

But unsure how to maximise the experience

Not all are clear of the benefits

Don't know how to monitor performance



Once taught the basics, there are a number of ways to engage our Routine Driven and embed indoor rowing in their routines



Indoor rowing classes as part of their regular routine

- Classes with new challenges periodically e.g. new distances to complete, calories to burn
- Loud music to allow them to get in the zone
- Others around them will help them to push themselves
- Regular sessions that they can schedule in

Structured workouts and plans to help them build routines and see progress

- British Rowing training plans appealing:
 - Downloadable plans to use individually
- Workouts which incorporate other machines – fitting rowing machine into current routine
- Workouts which will allow them to control the intensity – enabling them to push themselves

Personal performance tracking using tech / apps

- Rowactiv, LiveRowing apps appealing
 - To be able to see performance in the moment
 - Syncing your phone/ current tech
 - Challenge/ programme/ intensity options
- Would like tech to be goal led e.g. calories burned

You could pair the machines – competition against a friend to push yourself

Keeping their 'zone' sacred in the gym

- Stimulate senses – visual, sounds e.g. cheers from a crowd on Bluetooth headphones
- Virtual reality provision

Introducing our Socially Motivated

"The social element of exercising is as important to me as the exercise itself. Group classes are a great way to spend time with friends and have fun without being competitive. I typically don't have an exercise routine so classes need to be flexible and good value to keep me engaged."



MOTIVATIONS TO EXERCISE

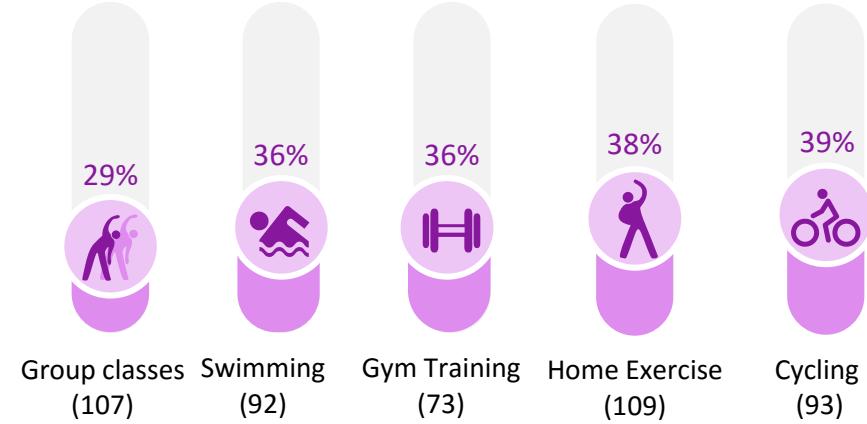
- Having fun
 - The physical activity isn't fun itself
 - So I look for fun through the environment and other people
- Spending time with others
 - Focus is on the opportunity to socialise rather than the exercise
- Looking after health as a by-product
 - Rely on social encouragement to take part, give it my all and keep it up

FITNESS AND INDOOR ROWING BEHAVIOURS

- Their exercise frequency is fairly low
- They prefer working out with others or as part of a class
- They currently have lower access and confidence on the rowing machine
- Many have lapsed (71%) and only a few currently indoor row (14%)



TOP SPORTS PLAYED (PAST 3 MONTHS)



WHAT THEY WANT FROM FITNESS PROVISION

- Friendly faces**
Feeling part of something social
- Friendly challenges**
In-the-moment encouragement and enjoyment
- Support through social media**
e.g. through recording and sharing
- Receive reassurance**
e.g. through an expert instructor or other participants

PERCEPTIONS OF INDOOR ROWING

- Opportunity for friendly challenge
 - No-one's reassuring or encouraging them
 - It's not currently social
- It's a time-efficient workout, meaning more time socialising
 - Not aware of how to gain support through social media



Once taught the basics, the biggest opportunity for our Socially Motivated segment is making indoor rowing more social



Indoor rowing classes that are social and fun

- Music key to keep the session lively and fun
- Dedicated instructors, passionate about indoor rowing
 - Able to advise on technique / hand-hold
- Or VR classes
- Communal indoor rowing classes also appealing – small teams competing against each other

Create connections through tech and social media

- Link indoor rowing to fitness tracking devices and social media activity
- Ability to share performance, gain support and encouragement from others and compete against friends
- Ability to sync with other tech and share and compare appealing aspects of Rowactiv and LiveRowing apps

Make the machines more visible in the gym

- In a gym environment the position of machines can play a big role in how involved they feel e.g. raised machines, with visible TV screens
- Feeling involved and part of the gym

Creating social connections through indoor rowing will help to keep our Socially Motivated engaged

Introducing our Personal Goal Seekers

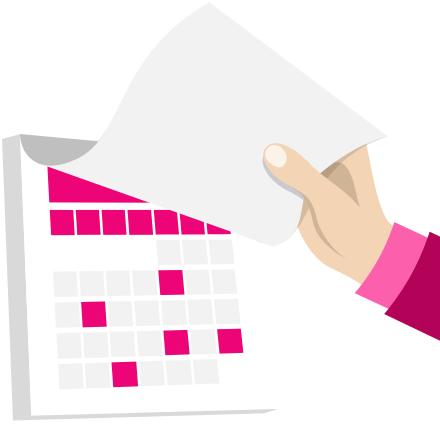


"My motivation for exercise is largely driven by working towards a challenge or event. Competing against others is enjoyable but I don't rely on them to be motivated. I also love tracking my performance with new tech and apps."

Proportion
15%
Size
2.3m

FITNESS AND INDOOR ROWING BEHAVIOURS

- Their exercise frequency is high (second highest of all segments)
- Exercise alone or with others; internal motivation driven by upcoming challenges / events
- Lower access and confidence on the rowing machine
- Few current indoor rowers (8%) – more likely to be lapsed (73%) or non (19%)



MOTIVATIONS TO EXERCISE

- To challenge myself
 - Exercise when aiming to complete a specific sporting event / challenge
 - Like competition but not reliant on others for motivation
- Physical benefits
 - Want to see visible / physical results
- Mental benefits
 - Looking to relieve stress and tension – want to feel strong mentally

WHAT THEY WANT FROM FITNESS PROVISION

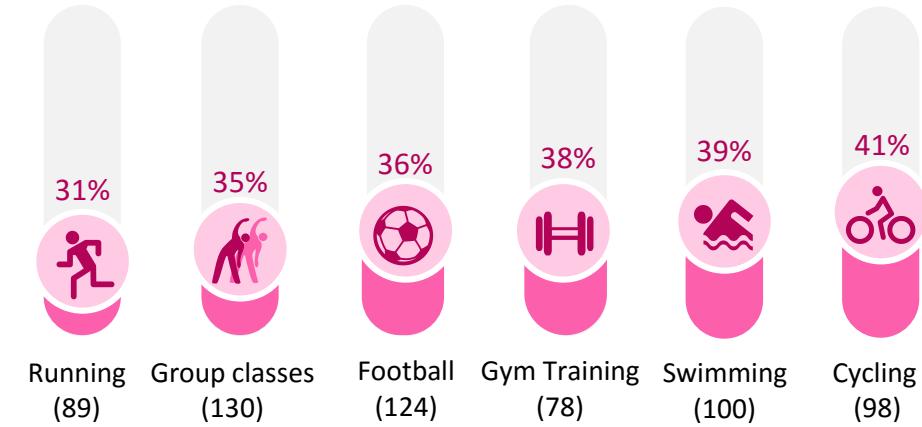
To be set challenges
e.g. challenge to row The Channel

To push themselves
e.g. challenge to beat their PBs

To track their performance & compete
e.g. seeing results

Social environment
To become part of a sporting community

TOP SPORTS PLAYED (PAST 3 MONTHS)



WHAT STOPS THEM INDOOR ROWING

"It's boring"

"It's too repetitive"

"Prefer other forms of exercise"

"Get benefits I need from other activities"

Introducing our Competitive Rivals



"I play a lot of team and 1v1 sports – I love the competition and feeling challenged! I enjoy using the weights but struggle to maintain routine as I'm reliant on others to motivate me, which is why I've signed up to personal training in the past."

Proportion
29%
Size
4.6m

FITNESS AND INDOOR ROWING BEHAVIOURS

- Their exercise frequency is average (vs. other segments)
- They prefer to exercise with others, rather than alone
- This segment has lower access and confidence on the rowing machines
- Below average levels for current indoor rowers (12%) – majority are lapsed (71%)



MOTIVATIONS TO EXERCISE

- To compete against others
 - Struggle to have an exercise routine – heavily reliant on competing with others for motivation
- Working towards an event / goal
 - Train for sporting events or if I'm trying to get toned / lose weight
- Because I feel like I should
 - Enables me to eat what I want and keep my body in decent shape

WHAT THEY WANT FROM FITNESS PROVISION

Competition with others

e.g. team based or head to head challenges

Flexibility and variety

Range of activities they can fit around their lives, on their terms

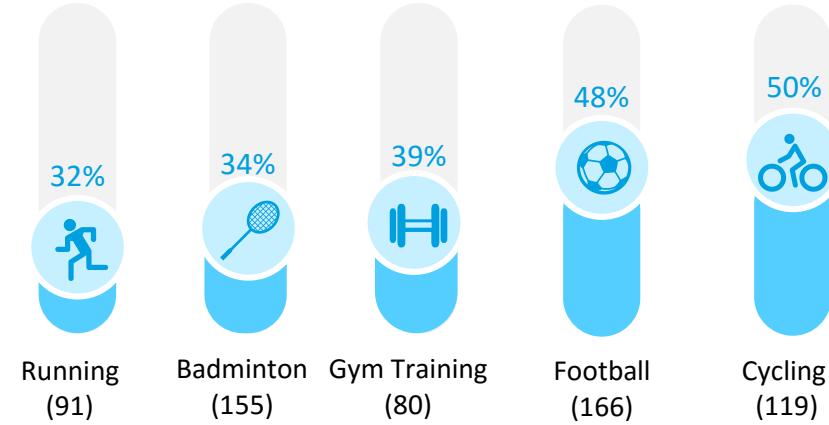
To track their performance & compete

e.g. seeing results

Set goals to work towards

e.g. weight loss or burning X number of calories

TOP SPORTS PLAYED (PAST 3 MONTHS)



WHAT STOPS THEM INDOOR ROWING

“Prefer other forms of exercise”

“It’s not competitive enough”

“Worried about injuring myself”

“It’s painful to use”

Introducing our Passive Introverts



"While I'm conscious I could do more to improve my fitness, I find it difficult to motivate myself and have a routine – it's just not enjoyable! Group classes or socialising with others while exercising does not appeal, I need to do my own thing."

Proportion
10%
Size
1.6m

FITNESS AND INDOOR ROWING BEHAVIOURS

- Their exercise frequency is low (vs. other segments)
- They much prefer to exercise alone rather than with others
- They have average levels of access but higher confidence with using rowing machines
- Just above average levels of indoor rowers (18%) but the majority are lapsed (64%)



MOTIVATIONS TO EXERCISE

- Because I feel like I should
 - Conscious I could do more to improve my health - exercise can help with this but I struggle with a routine
- To lose weight / get thinner
 - Working towards a goal is motivating (e.g. weight loss) – I like to see physical results
- Improving health and fitness
 - To prevent or treat health problems associated with increasing age

WHAT THEY WANT FROM FITNESS PROVISION

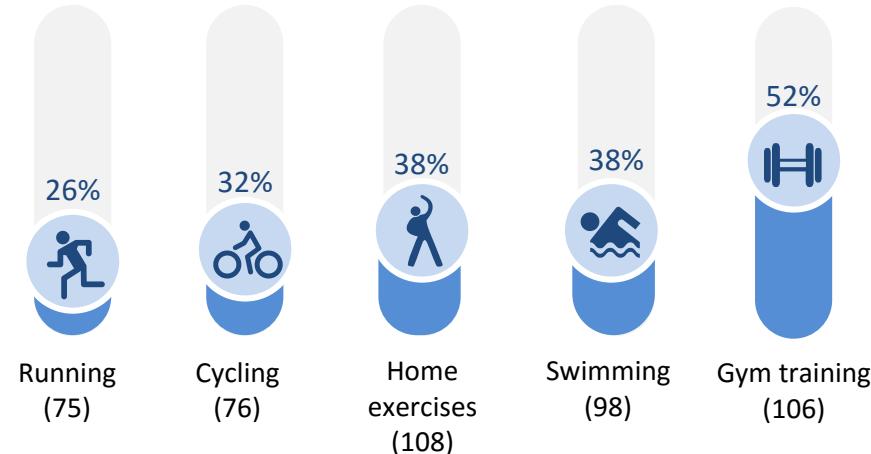
To do their own thing
i.e. not on display in front of others

Cheap and flexible
e.g. pay as you go gym access

Goals to work towards
Struggle with routines otherwise

Friendly environment
Welcoming environment that is not intimidating

TOP SPORTS PLAYED (PAST 3 MONTHS)



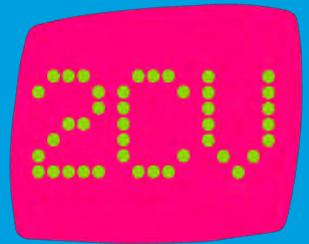
WHAT STOPS THEM INDOOR ROWING

"It's boring"

"I'm not fit enough to use a machine"

"Prefer other forms of exercise"

"Feel too self-conscious using a machine"



Recommendations

Activating our priority segments and sustaining behaviours is a four-staged strategy

1. Teach them the basics

- **How to use the machine**
 - Technique
 - Programmes and settings
- **How to make indoor rowing work for them**
 - To achieve their fitness goals
 - To fit it into their routine
- This could be achieved by:
 - Empowering gym staff/ instructors to help gym goers with the basics
 - Adding a ‘technique’ 10 mins to the start of a new rowing class or challenge
 - Creating drop in ‘tips and techniques’ sessions
 - Providing downloadable technique videos / tips

2. Engage them by raising the profile of indoor rowing

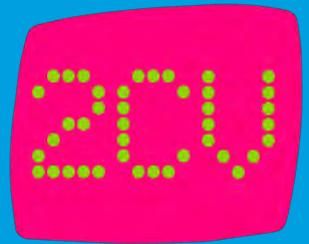
- **Launch indoor rowing classes**
e.g. HIIT sessions, spin-style sessions that grab attention
- **Develop indoor rowing challenges** that help to engage and raise the profile of rowing on the gym floor
- **Position rowing machines** more prominently in the gym to get attention
- **Create provision that allows rowers to ‘zone out’** and de-stress, and that creates talkability e.g. virtual reality screens, rowing on water

3. Sustain indoor rowing behaviours

- **Support technology** that helps them to track their performance and compete with others, that syncs with their tech
- **Deliver training plans** to help communicate the benefits of rowing/ how it fits in fitness programme
- **Launch online rowing leagues** to allow rowers to compete vs others
- **Develop communities** of rowers e.g. on social media

4. Help to make them feel like a ‘rower’

- **Create a community** – Create tailored indoor rowing content, membership, subscription, newsletter, discounts to events
- **Calls to action** – promote events, rowing fundraisers, challenges & competitions
- **‘Appropriate imagery/language’** – reflect and connect with target audiences



For more information please contact:

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BRITISH ROWING