

BESPOKE SURVEYS

Fitness Volume 21

PTON, PLNT, and Peers

1,250+ US Consumers, Balanced to Census

FEBRUARY 2022

CHECK BREAKDOWN: FITNESS

TREND CHECKS

Peloton and Delivery Fees

Most respondents who say they are currently contemplating purchasing Peloton equipment said they would expect delivery and set up to be included (78%). Among these folks who would expect it to be included, the majority (75%) say that if they learned delivery and set up were not included it would make them less likely or much less likely to buy it. All told, the set up and delivery fee does make them less likely to pull the trigger, especially for those considering buying the bike.

Overall Exercise Activity

Exercise activity was mostly in-line with prior waves, if just a touch softer sequentially. The percentage of consumers with gym memberships ticked up a touch this quarter relative to October. Exercising on my own remains the most popular option. Among gym members, visit frequency took a step back in February relative to our October and July waves from 2021.

At-Home Fitness Interest

Interest in at-home fitness products/services peaked in our May 2021 survey. Interest remains above pre-pandemic levels, but a touch lower than series bests. Peloton remains, by far, the first product/service that comes to mind for consumers interested in getting at-home fitness products that they do not already have. The percentage of consumers who would find it appealing to work out at home in an exercise class environment is above pre-pandemic levels, but has declined relative to series highs set in October of 2020.

Peloton Trends

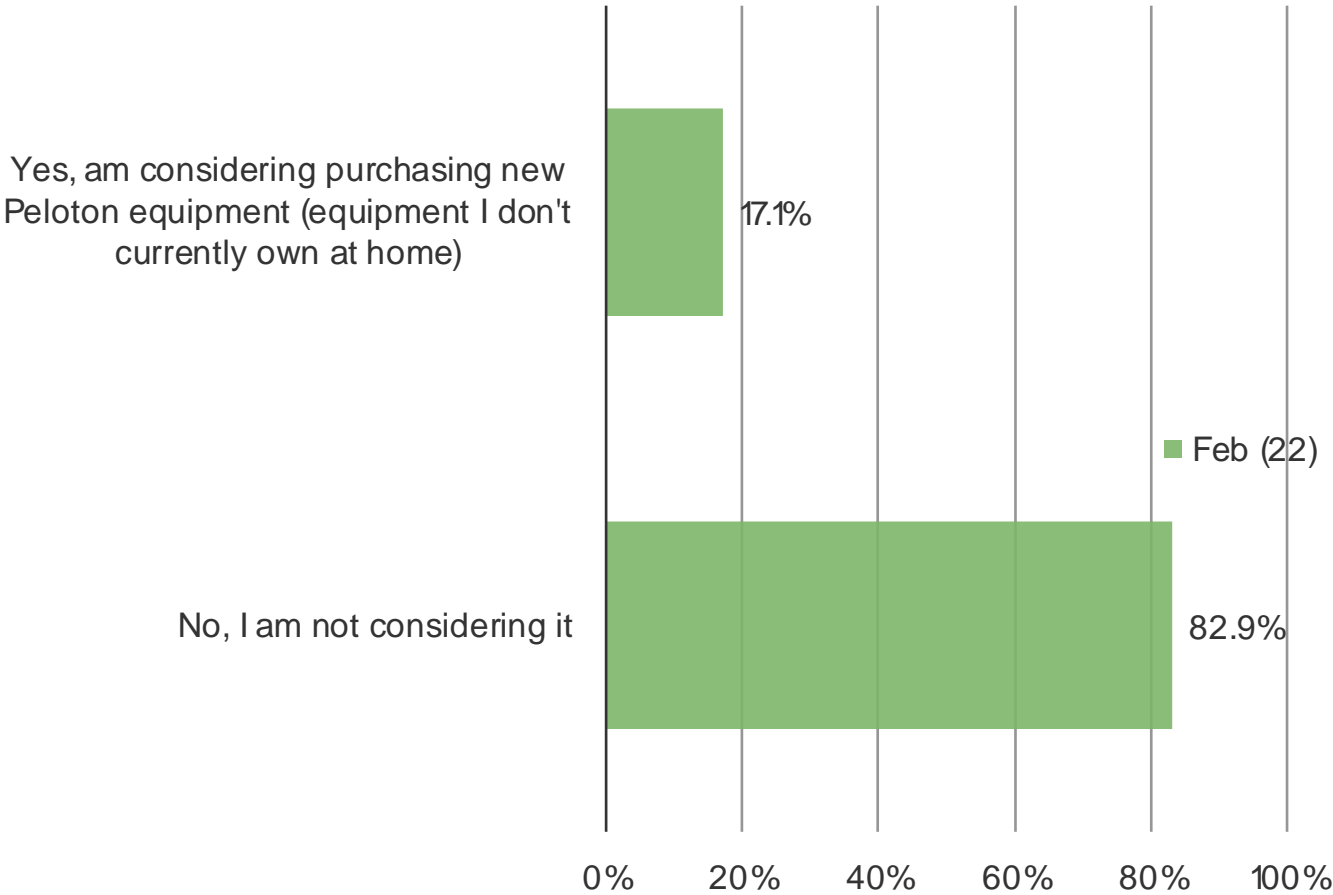
Awareness of Peloton is at all-time series highs in our survey. Sentiment toward the Peloton brand has softened slightly over time, but still remains the top in our survey (above NordicTrack, Apple Fitness+, Echelon, etc). The percentage of consumers who said they currently own products from Peloton or subscribe/pay for the Peloton app is down a touch from series highs set in July of 2021. Engagement frequency among those who say they own Peloton equipment is roughly flat q/q.

Among those who do not own Peloton equipment, likelihood of purchasing has softened a touch sequentially since July of 2021 and the average price that would make the Bike interesting to non Peloton owners has declined over time.

NEW QUESTIONS

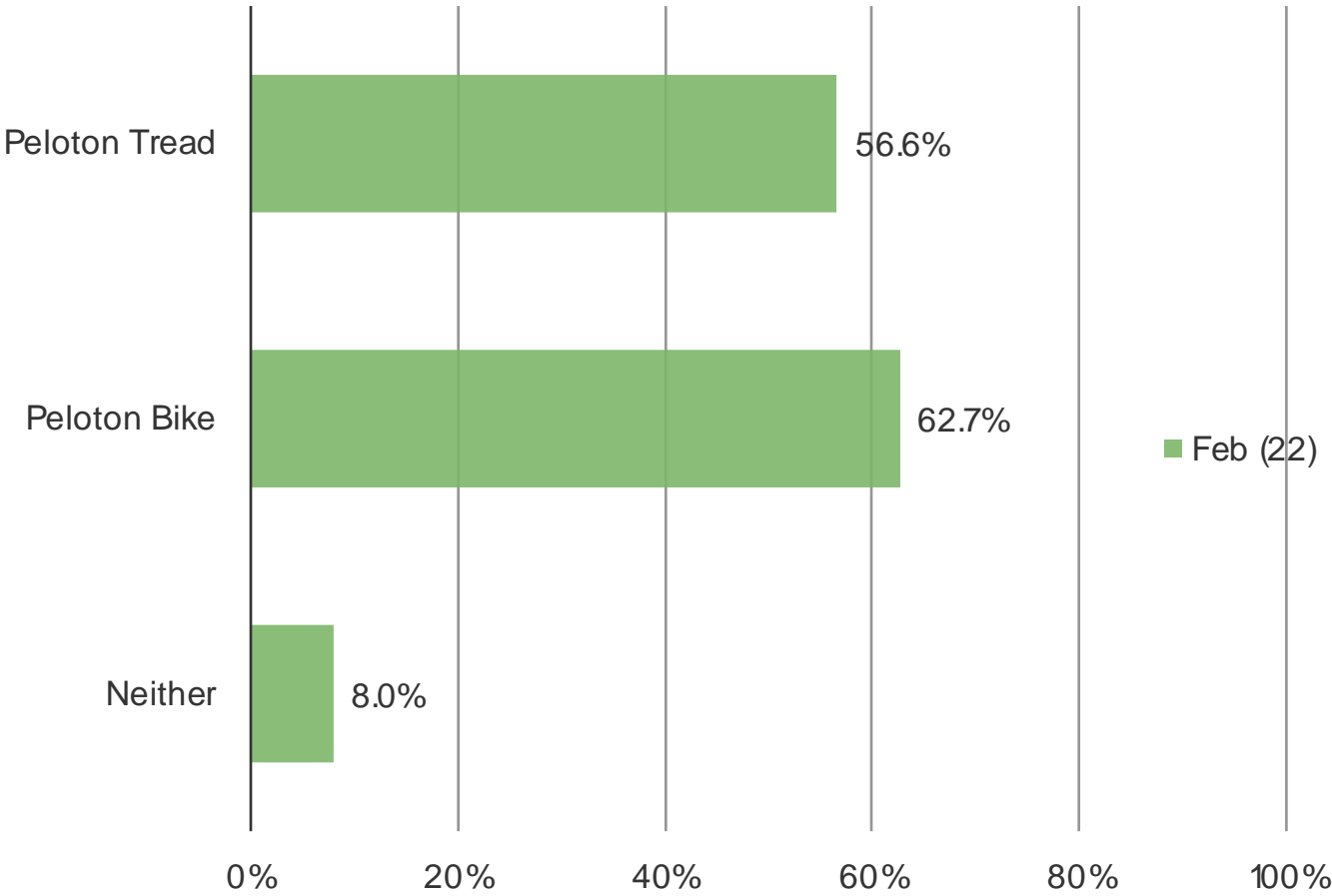
ARE YOU CURRENTLY CONSIDERING PURCHASING A NEW PIECE OF FITNESS EQUIPMENT FROM PELOTON?

Posed to all respondents



WHICH OF THE FOLLOWING ARE YOU CONSIDERING PURCHASING?

Posed to respondents who are currently considering buying Peloton equipment (N = 216).

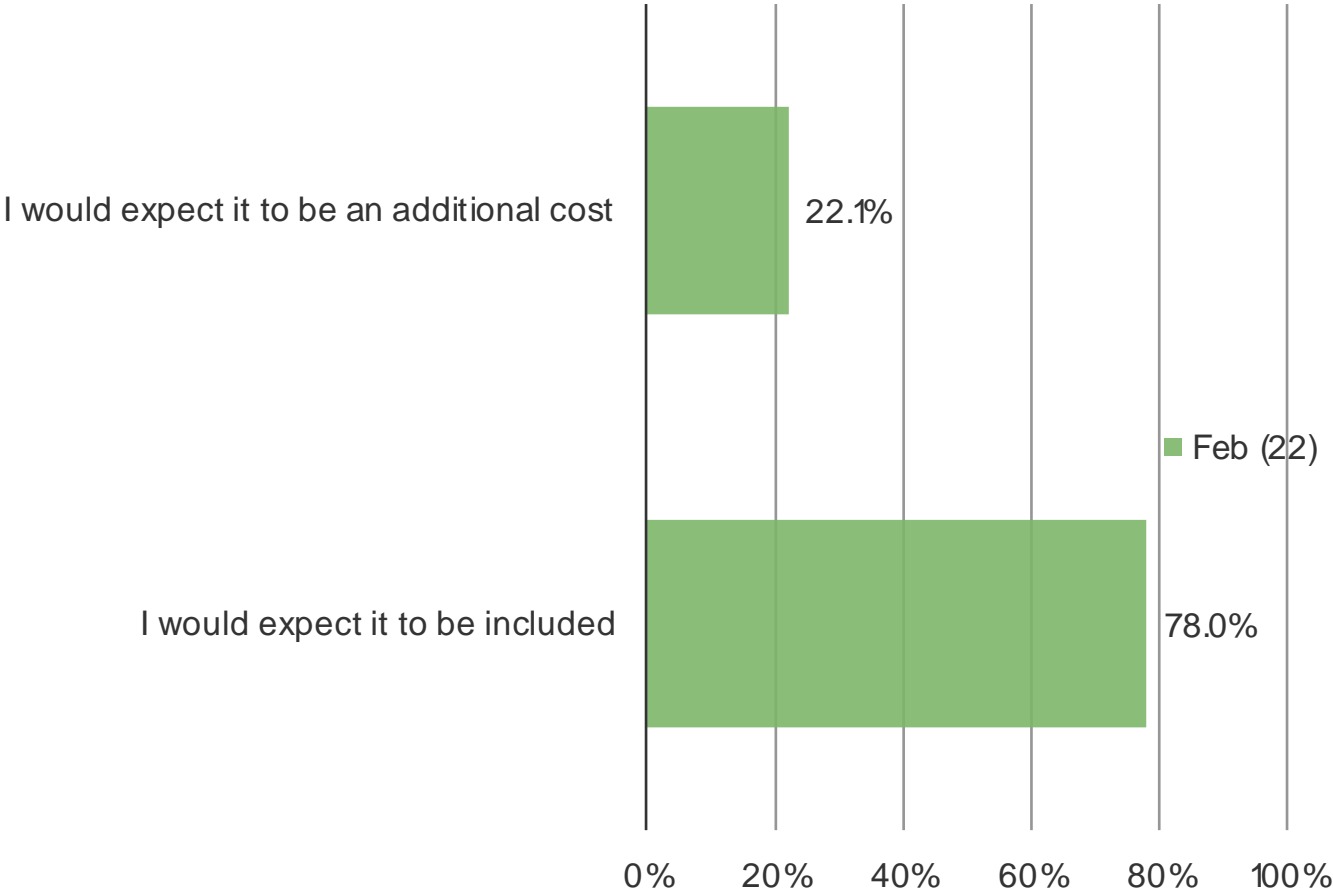


No Pain. No Gain.

Audience: 1,250 US Consumers
Date: February 2022

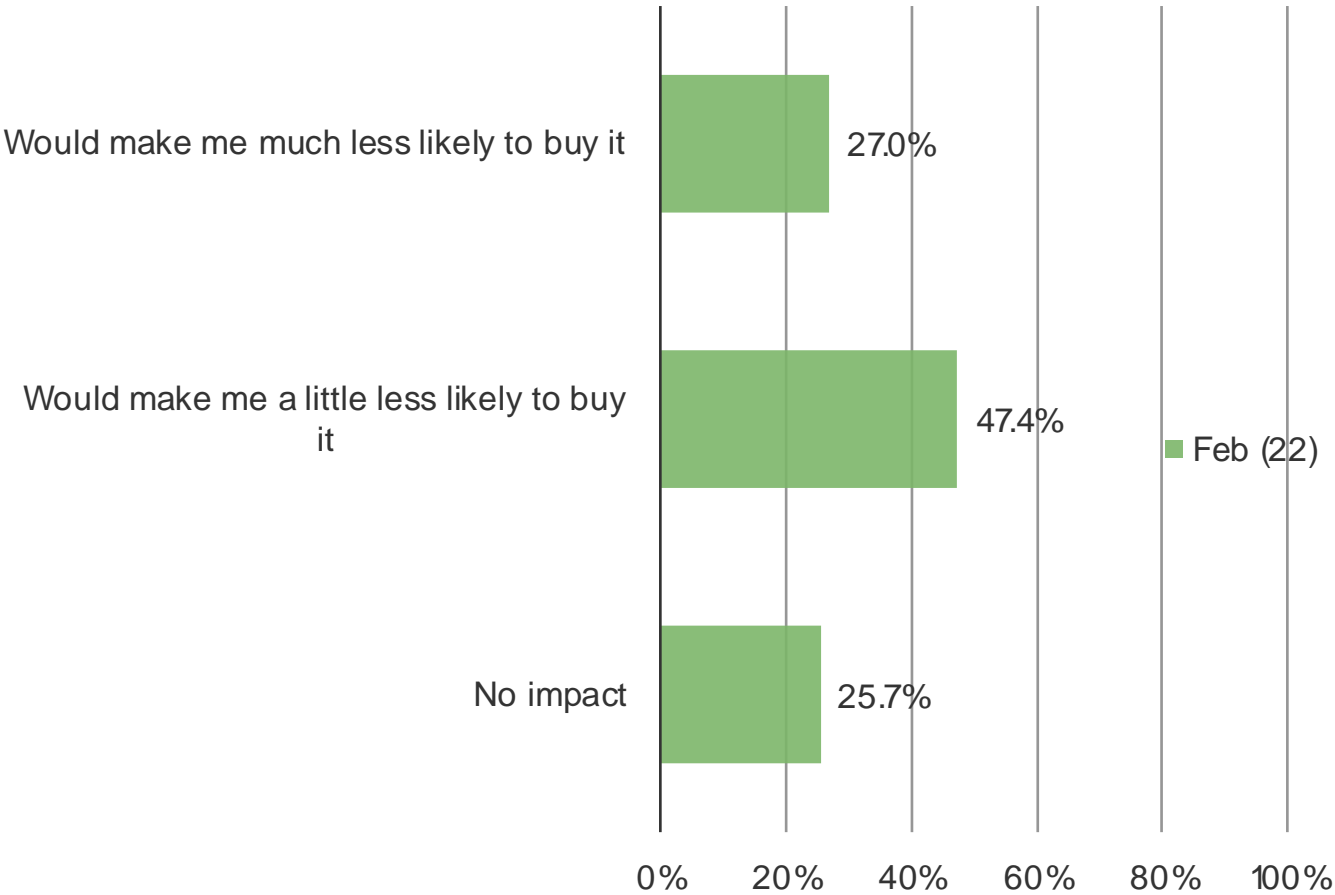
WOULD YOU EXPECT FOR DELIVERY AND SET UP TO BE INCLUDED IN THE PRICE OF THE EQUIPMENT, OR ADDITIONAL?

Posed to respondents who are currently considering buying Peloton equipment (N = 216).



WOULD IT CHANGE YOUR LIKELIHOOD OF BUYING PELOTON EQUIPMENT IF DELIVERY AND SET UP WAS AN ADDITIONAL COST?

Posed to respondents who are currently considering buying Peloton equipment and would have expected deliver and set up to be included (N = 154).

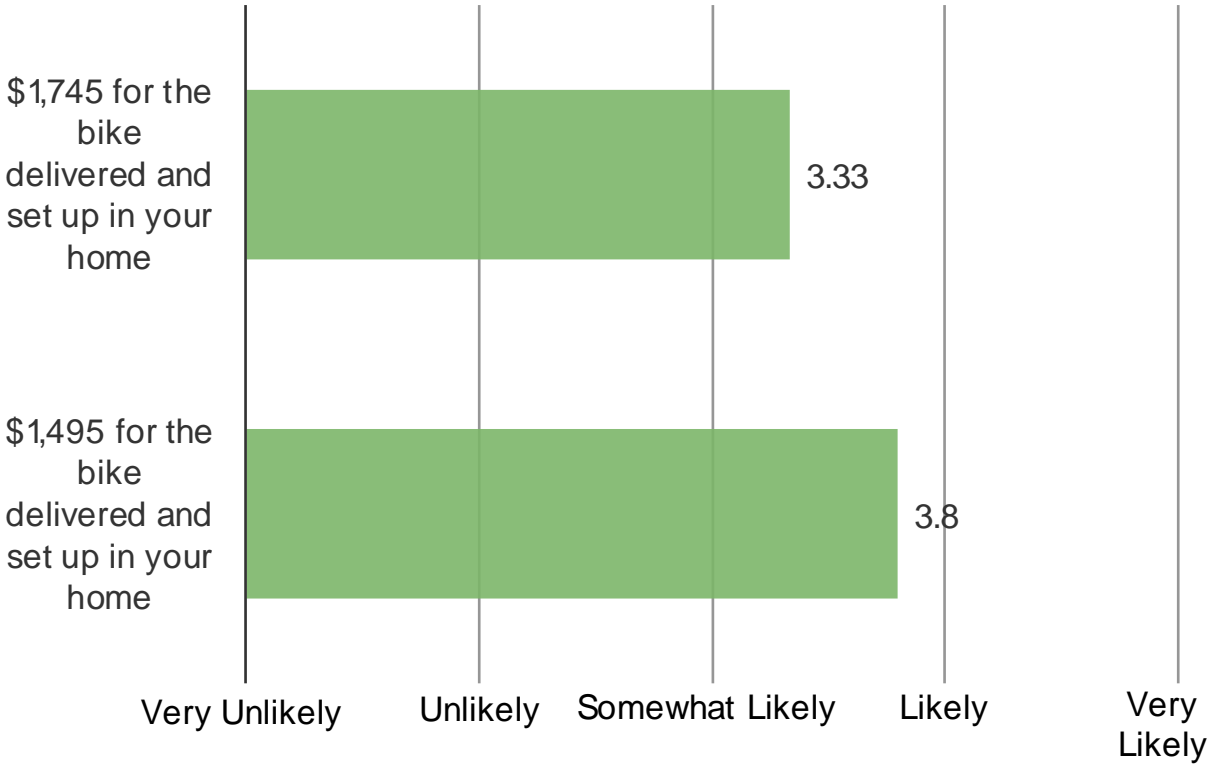


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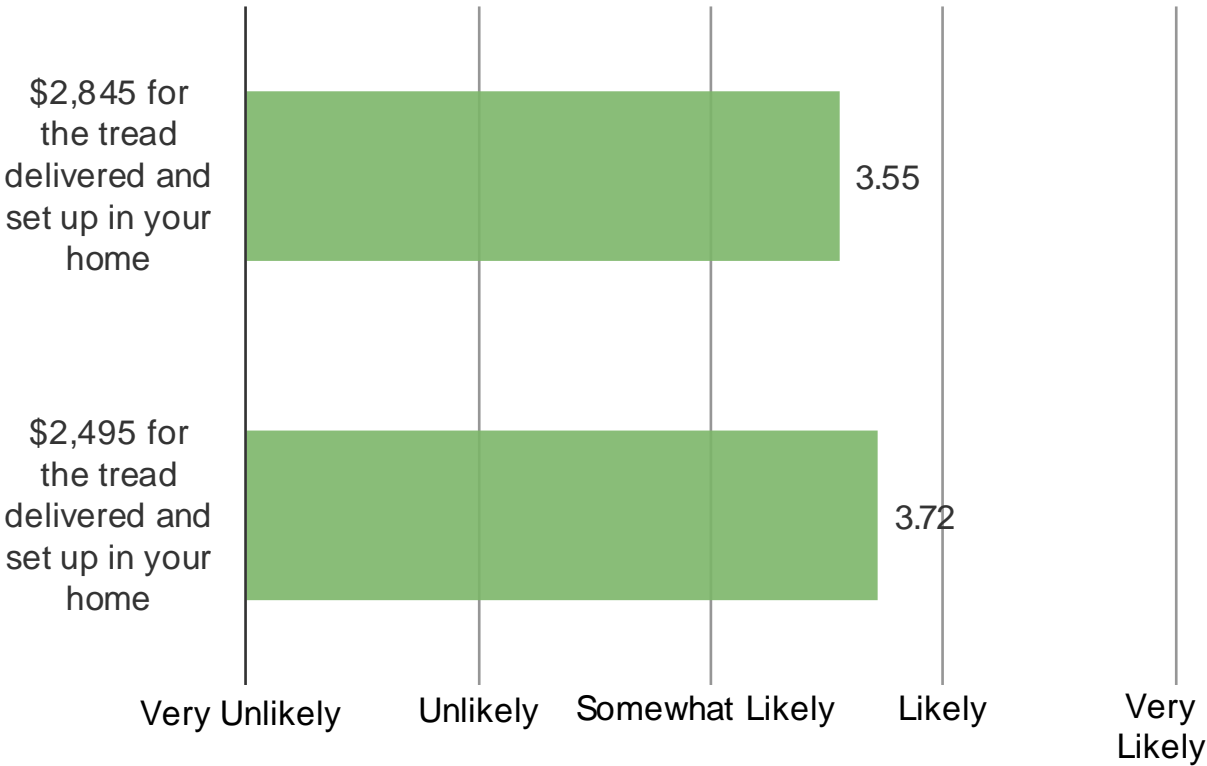
HOW LIKELY IS IT THAT YOU WILL MOVE FORWARD AND BUY THE BIKE IF THE COST TO YOU IS...

Posed to respondents who are currently considering buying the Peloton Bike (N = 137)



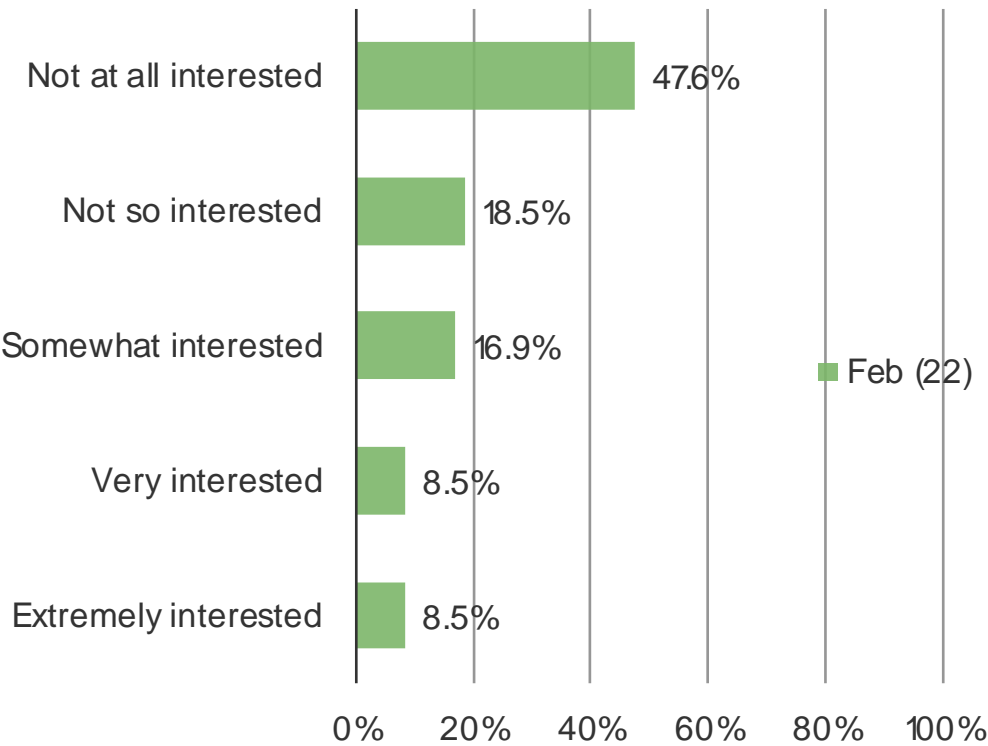
HOW LIKELY IS IT THAT YOU WILL MOVE FORWARD AND BUY THE TREAD IF THE COST TO YOU IS...

Posed to respondents who are currently considering buying the Peloton Tread (N = 123)



DO YOU HAVE ANY INTEREST IN PURCHASING PELOTON'S UPCOMING STRENGTH TRAINING PRODUCT, CALLED GUIDE?

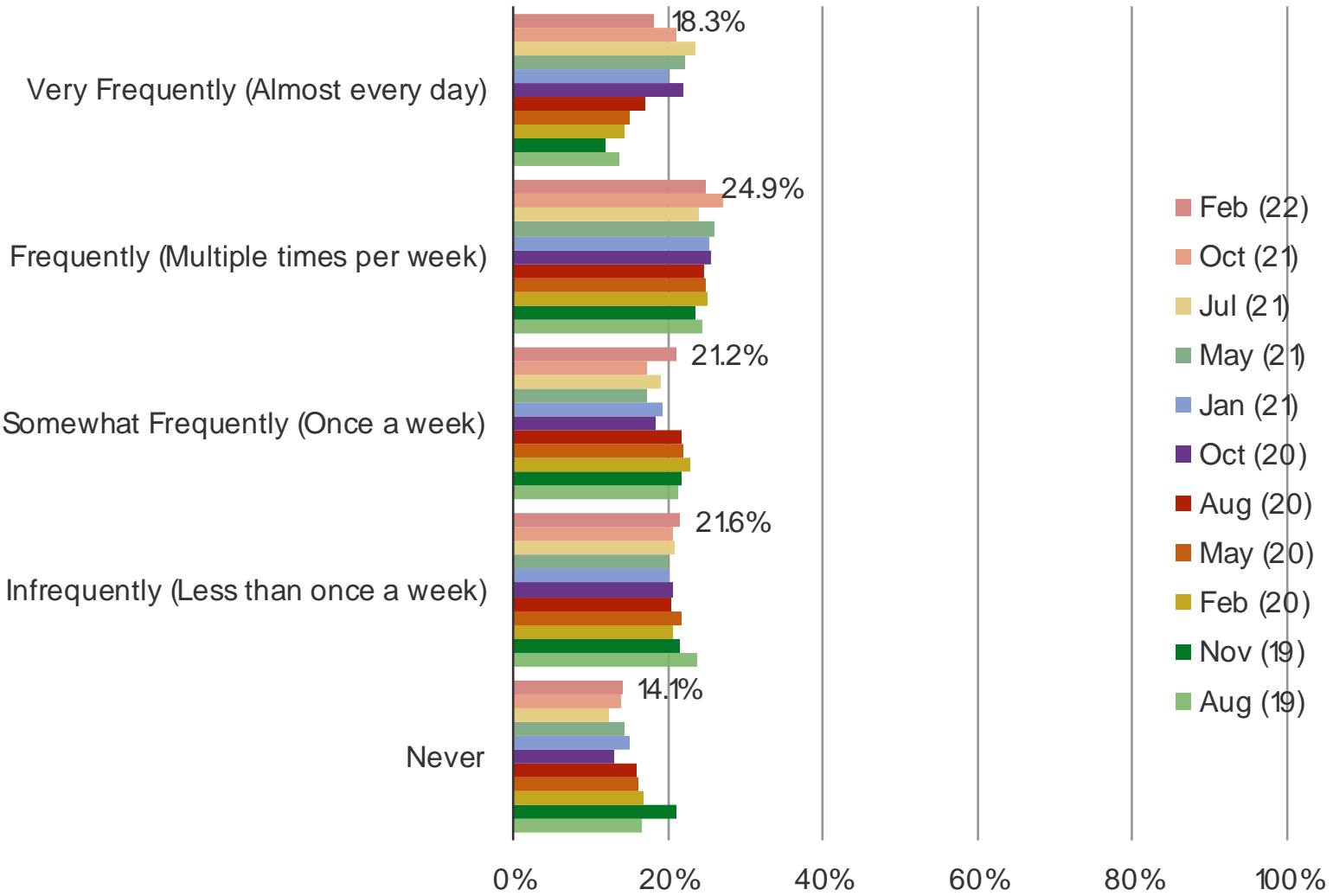
Posed to all respondents (N = 1251)



FITNESS OVERALL

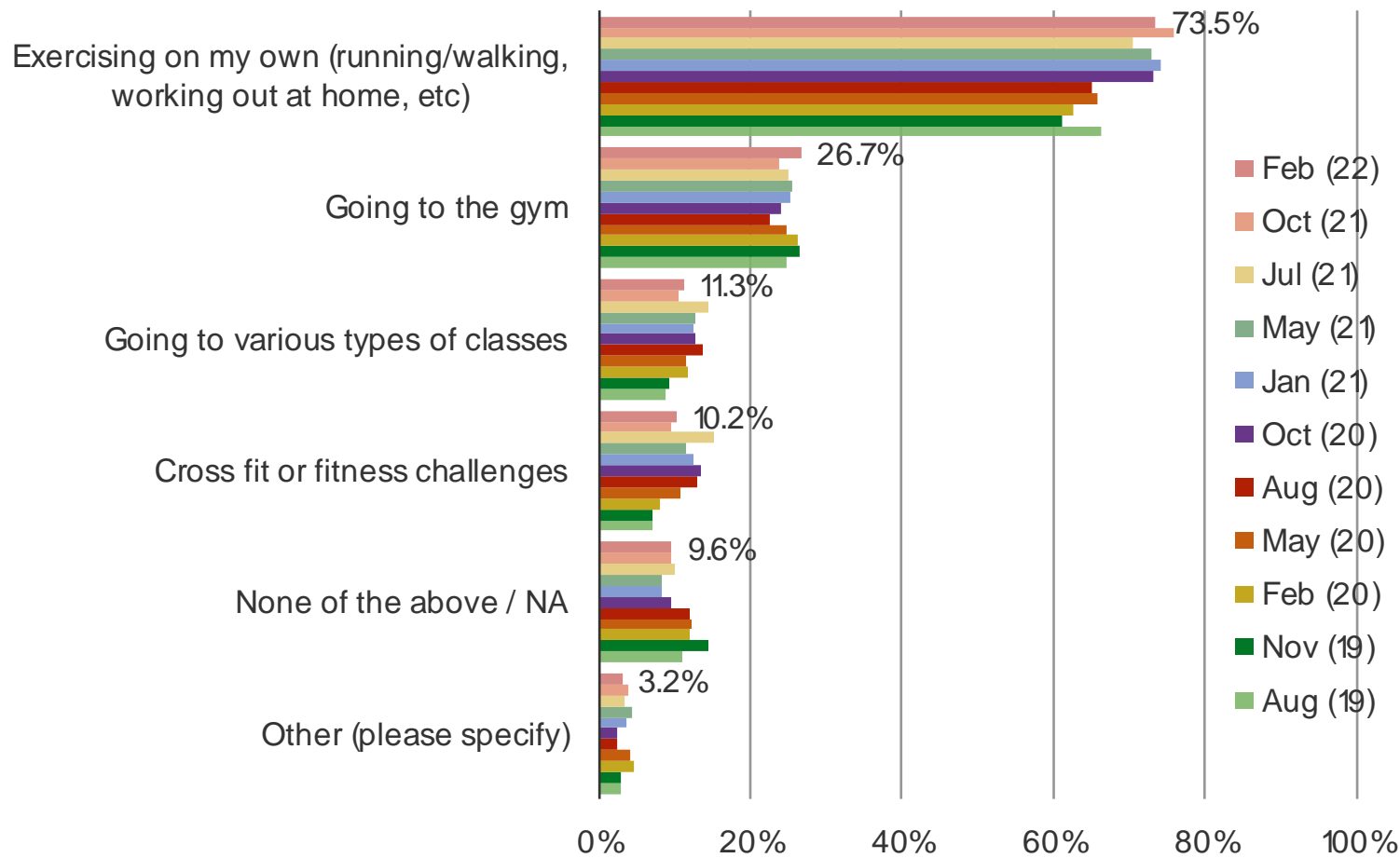
HOW OFTEN DO YOU EXERCISE?

Posed to all respondents



HOW DO YOU TYPICALLY WORK OUT? (SELECT ALL THAT APPLY)

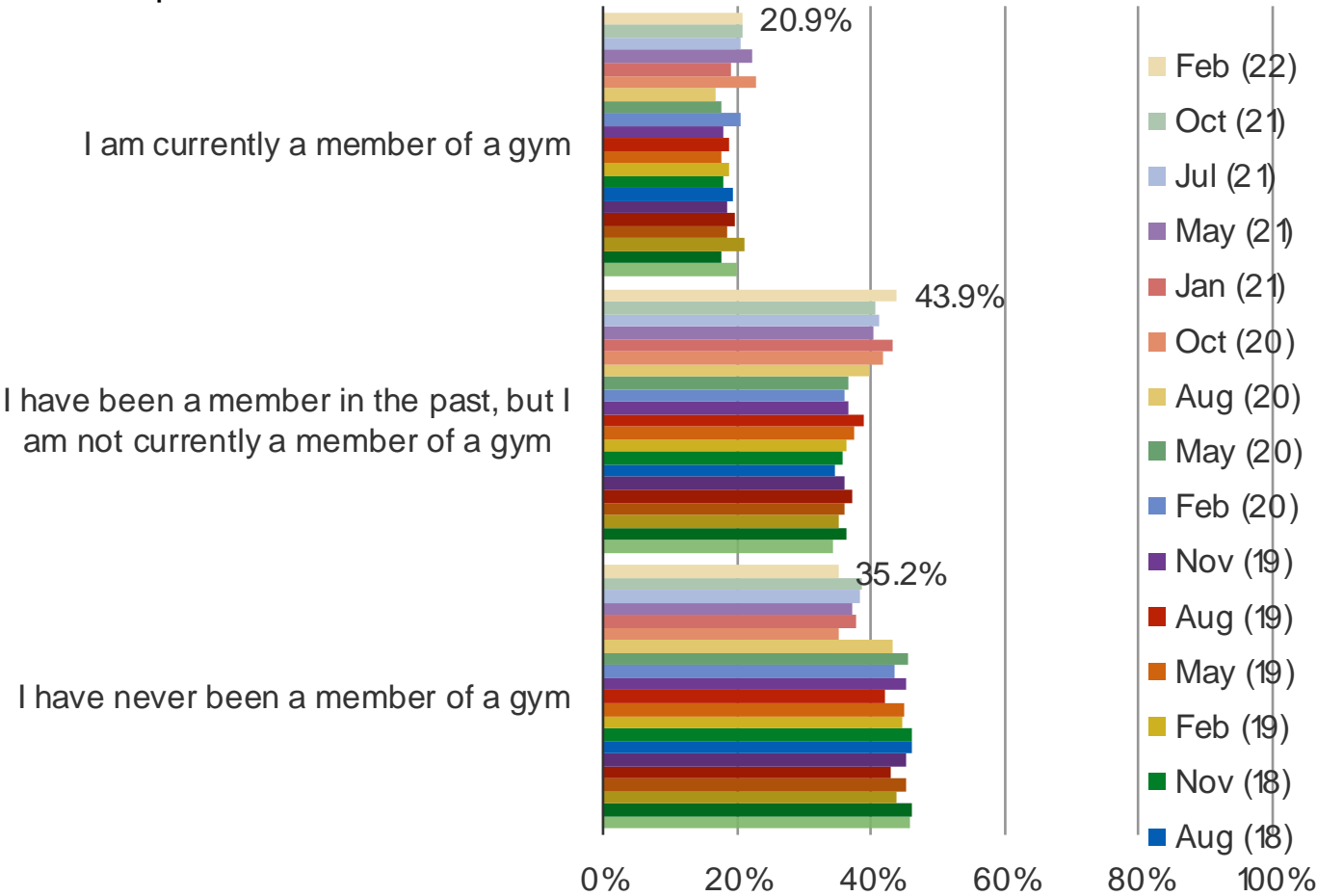
Posed to respondents who exercise



EXERCISE AND GYM MEMBERSHIPS

EXPERIENCE WITH FITNESS GYMS

Posed to all respondents

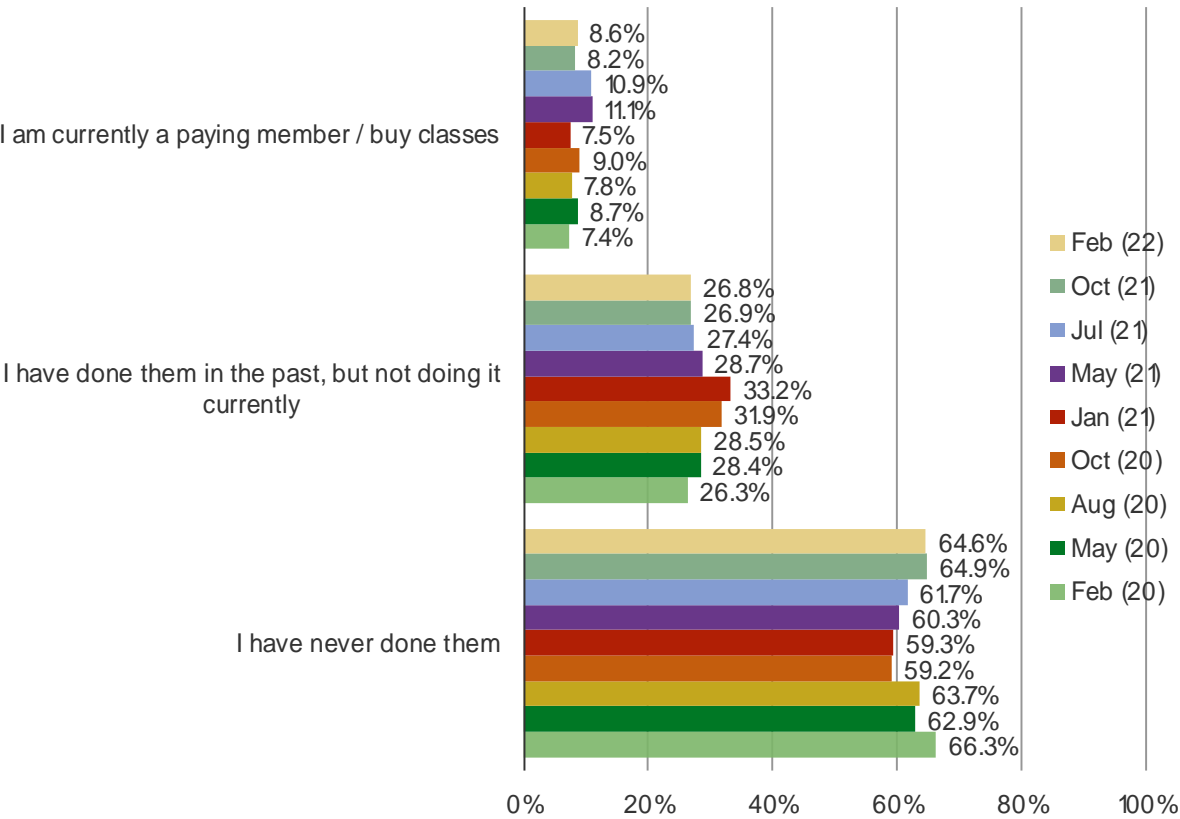


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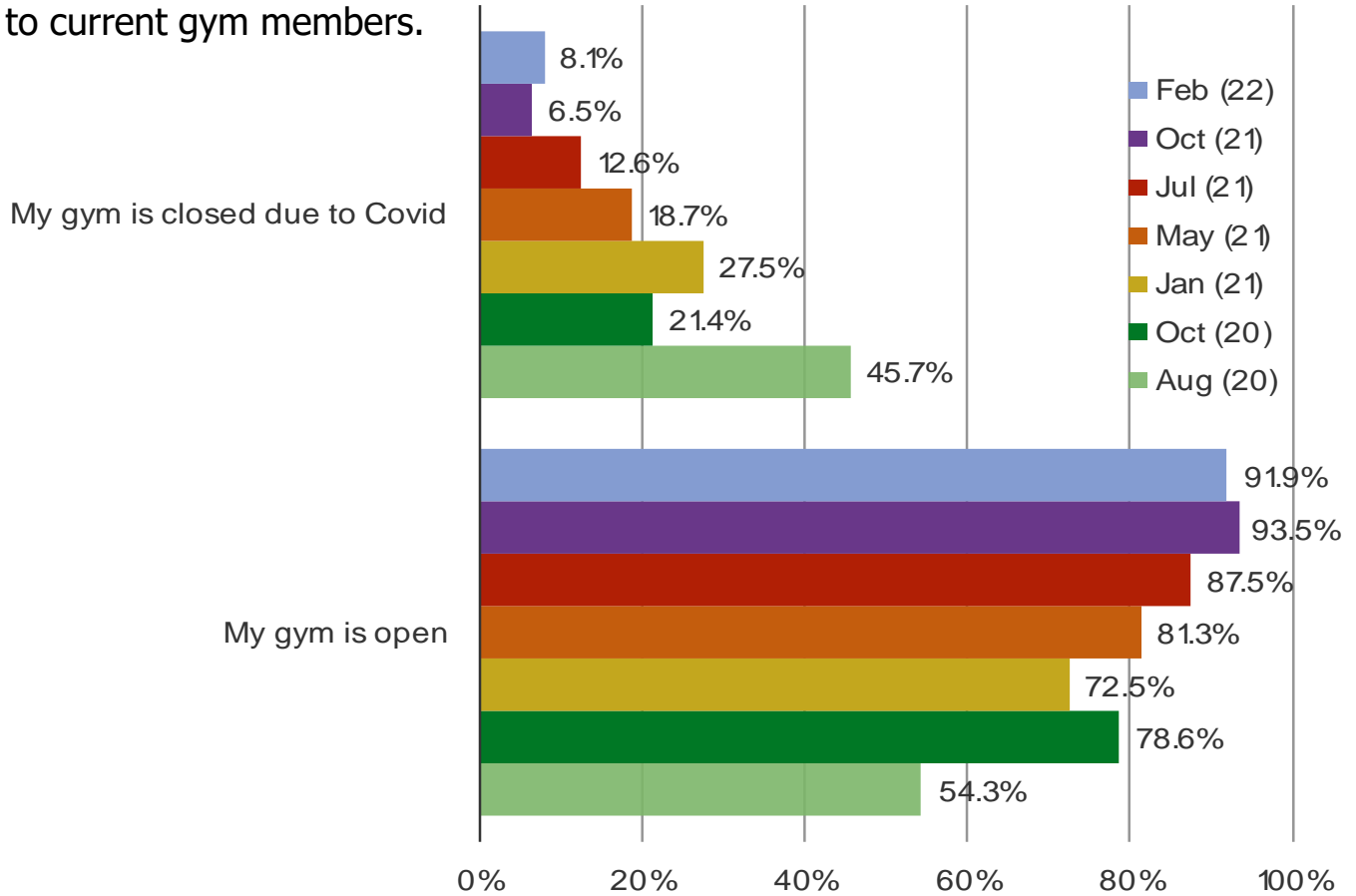
WHAT IS YOUR EXPERIENCE WITH FITNESS CLASS ENVIRONMENTS (SPIN CLASS, BOOT CAMPS, CROSS-FIT, ETC)?

Posed to all respondents

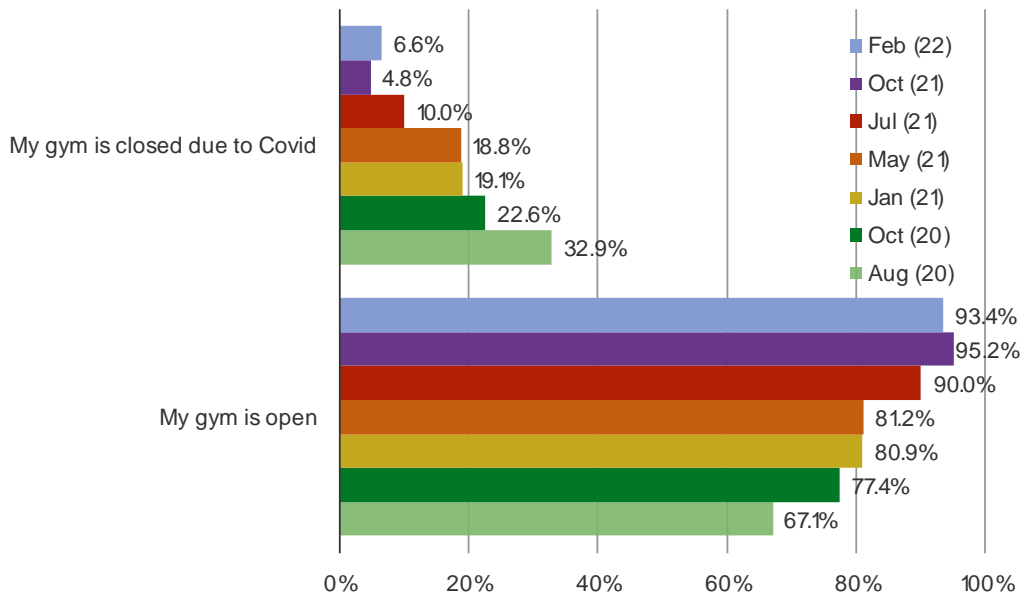


IS YOUR GYM CURRENTLY OPEN OR CLOSED DUE TO COVID?

Posed to current gym members.



Posed to current Planet Fitness gym members (n = 106).

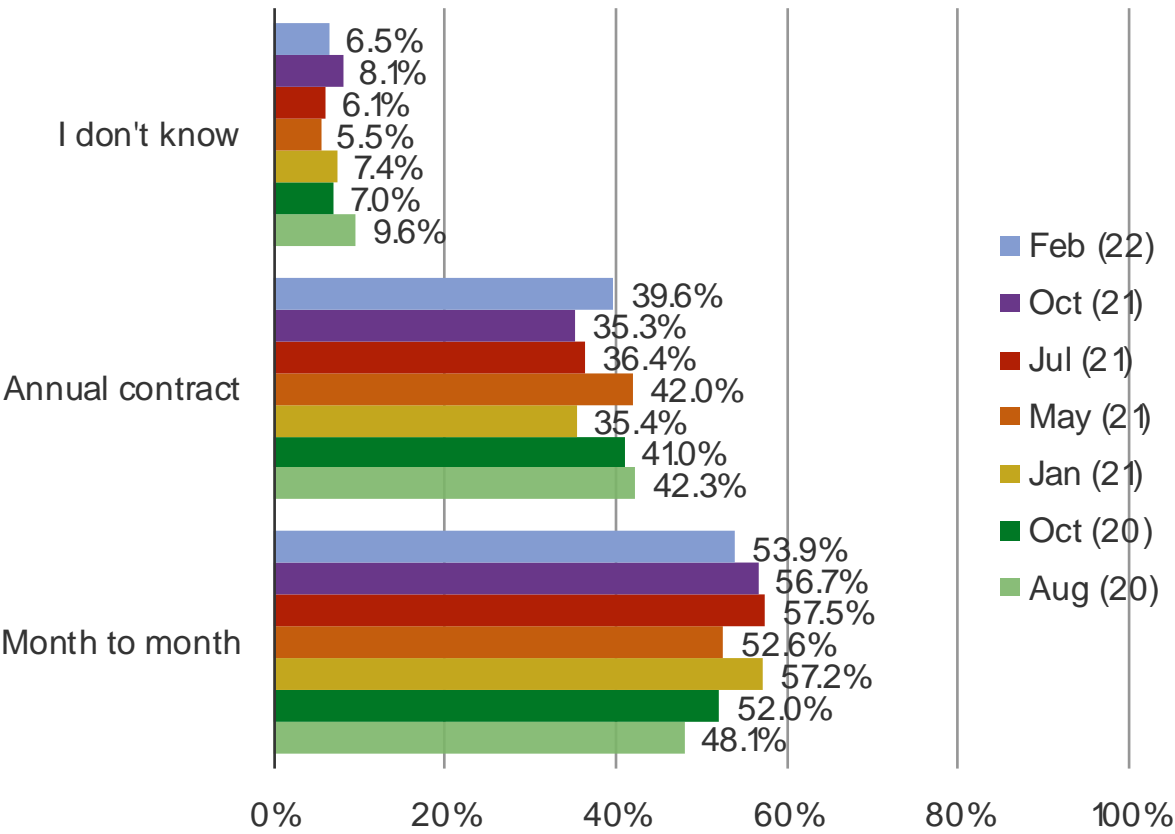


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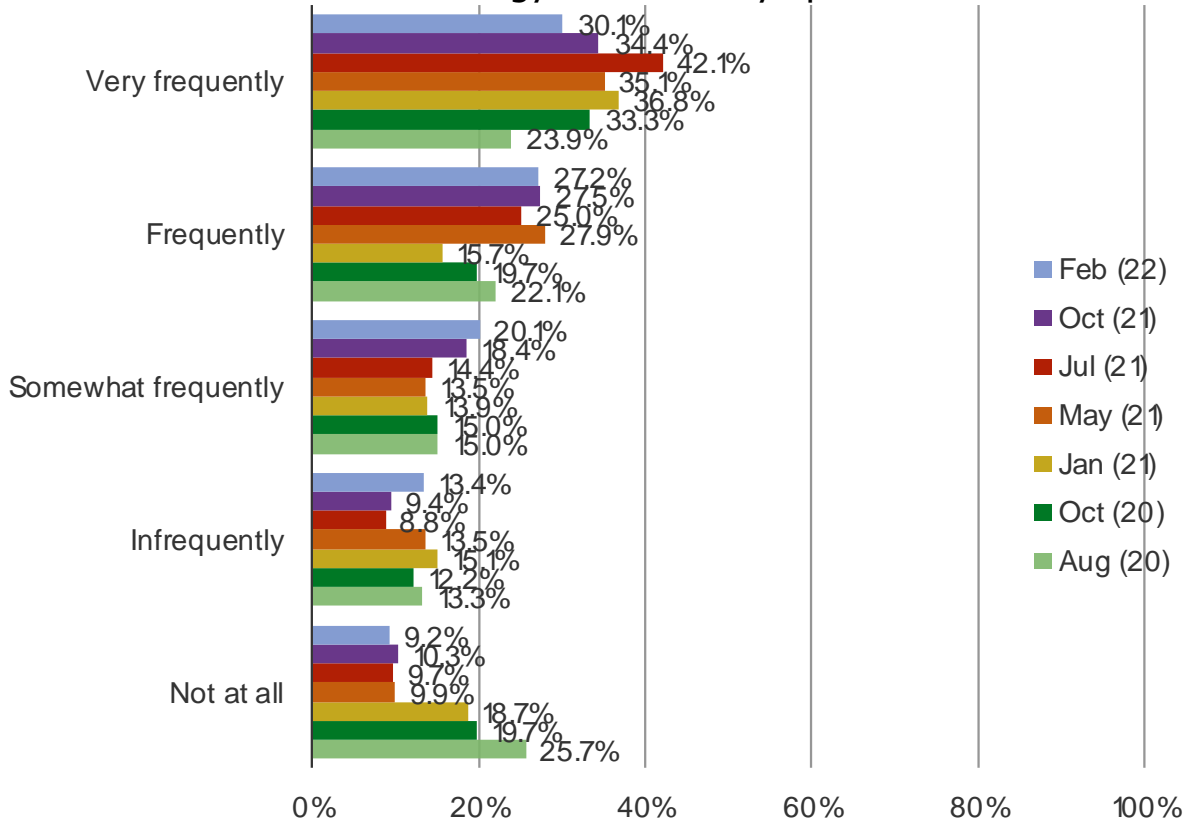
IS YOUR AGREEMENT WITH YOUR GYM...

Posed to current gym members.

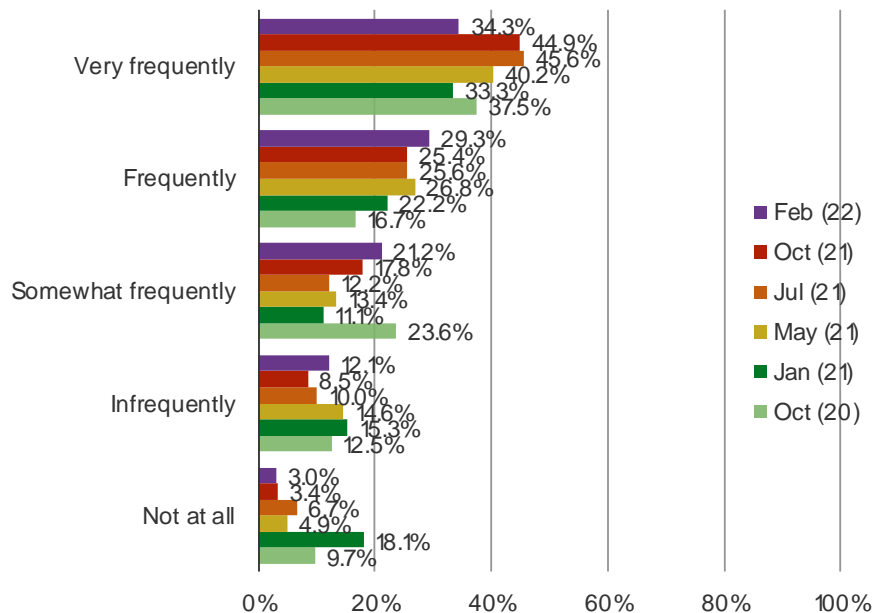


HOW OFTEN HAVE YOU BEEN GOING TO YOUR GYM IN THE PAST MONTH?

Posed to current members who said their gym is currently open.

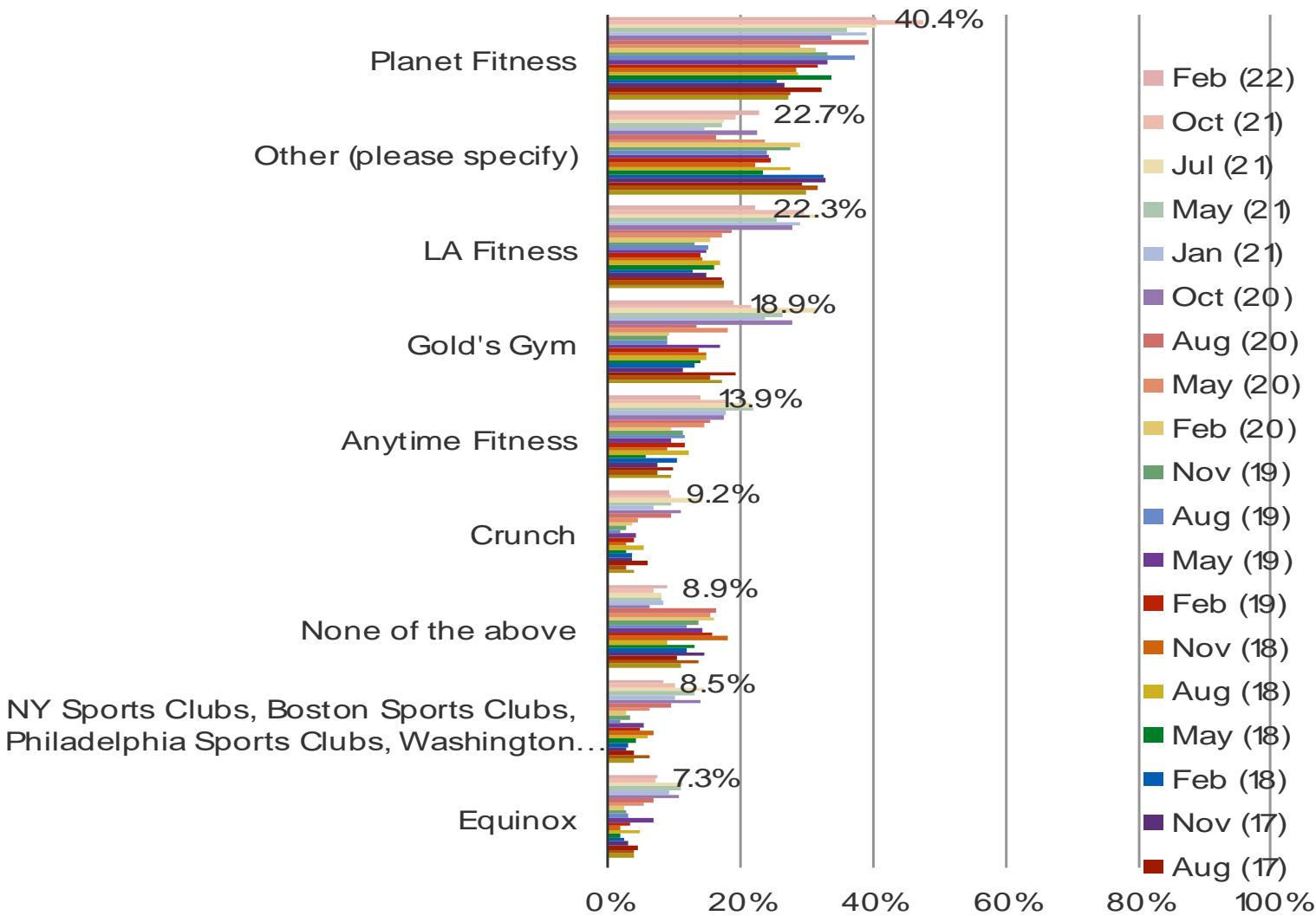


Posed to current Planet Fitness gym members who said their gym is open (n = 99).



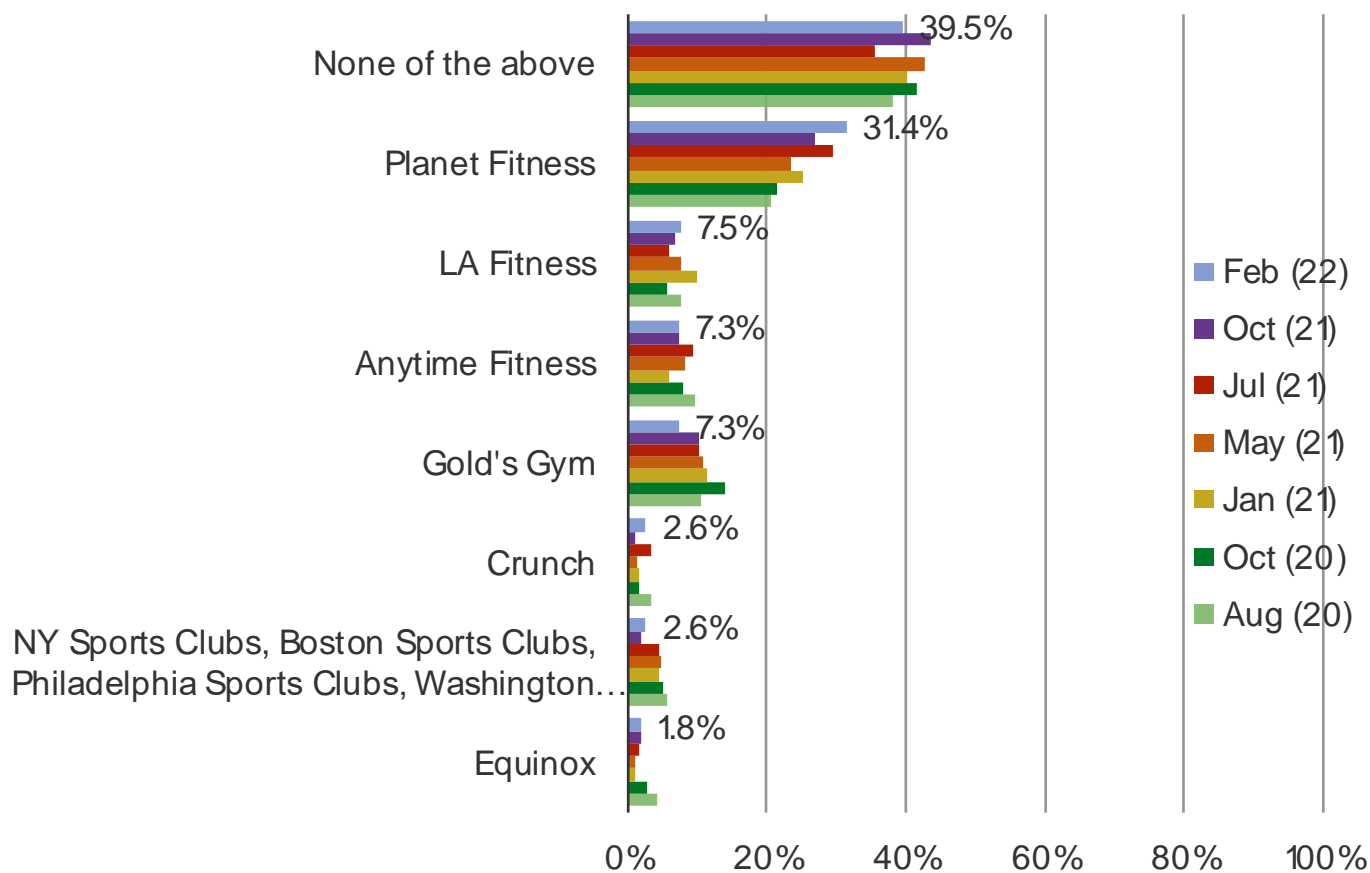
WHICH GYMS DO YOU CURRENTLY HAVE A MEMBERSHIP WITH? (SELECT ALL THAT APPLY)

Posed to respondents who are currently gym members.



WHICH GYM WERE YOU MOST RECENTLY A MEMBER OF?

Posed to respondents who have been a member of a gym in the past, but not currently.



PLANET FITNESS

No Pain. No Gain.

Audience: 1,250 US Consumers
Date: February 2022

PICTURED ABOVE ARE PLANET FITNESS MEMBERSHIP OPTIONS. WHICH MEMBERSHIP DO YOU HAVE?

Posed to Planet Fitness members.

PF BLACK CARD®
\$1 Down - No Commitment - Black Card!

Access to Any Club & All the Perks

\$22.99 /mo
plus taxes and fees

Select

Offer Expires August 1st

What you get

- ✓ Unlimited Access to Home Club
- ✓ Free Fitness Training
- ✓ Free WiFi
- ✓ Use of Any Planet Fitness Worldwide
- ✓ Bring a Guest Anytime
- ✓ Use of HydroMassage
- ✓ Use of Tanning
- ✓ Use of Total Body Enhancement
- ✓ Use of Massage Chairs
- ✓ 50% Off Drinks
- ✓ Worldwide Travel Deals
- ✓ 20% off at Reebok.com

How you get it

Startup Fee	\$1
Monthly Dues	\$22.99
Annual Fee	\$39
Commitment	no

CLASSIC
\$10 Never Went So Far!

Unlimited Access to Your Home Club

\$10 /mo
plus taxes and fees

Select

Offer Expires August 1st

What you get

- ✓ Unlimited Access to Home Club
- ✓ Free Fitness Training
- ✓ Free WiFi
- ✓ Use of Any Planet Fitness Worldwide
- ✓ Bring a Guest Anytime
- ✓ Use of HydroMassage
- ✓ Use of Tanning
- ✓ Use of Total Body Enhancement
- ✓ Use of Massage Chairs
- ✓ 50% Off Drinks
- ✓ Worldwide Travel Deals
- ✓ 20% off at Reebok.com

How you get it

Startup Fee	\$10
Monthly Dues	\$10
Annual Fee	\$39
Commitment	12 month

NO COMMITMENT
No Commitment! No Catches! No Kidding!

Cancel Anytime!

\$15 /mo
plus taxes and fees

Select

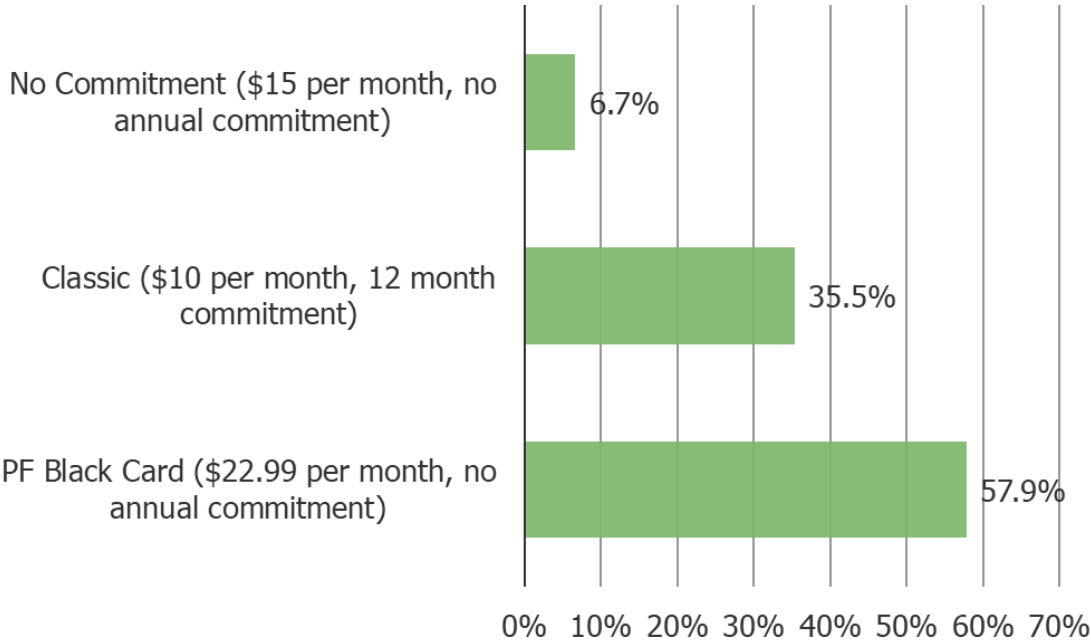
Offer Expires August 1st

What you get

- ✓ Unlimited Access to Home Club
- ✓ Free Fitness Training
- ✓ Free WiFi
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- ✓ Use of Tanning
- ✓ Use of Total Body Enhancement
- ✓ Use of Massage Chairs
- ✓ 50% Off Drinks
- ✓ Worldwide Travel Deals
- ✓ 20% off at Reebok.com

How you get it

Startup Fee	\$15
Monthly Dues	\$15
Annual Fee	\$39
Commitment	no



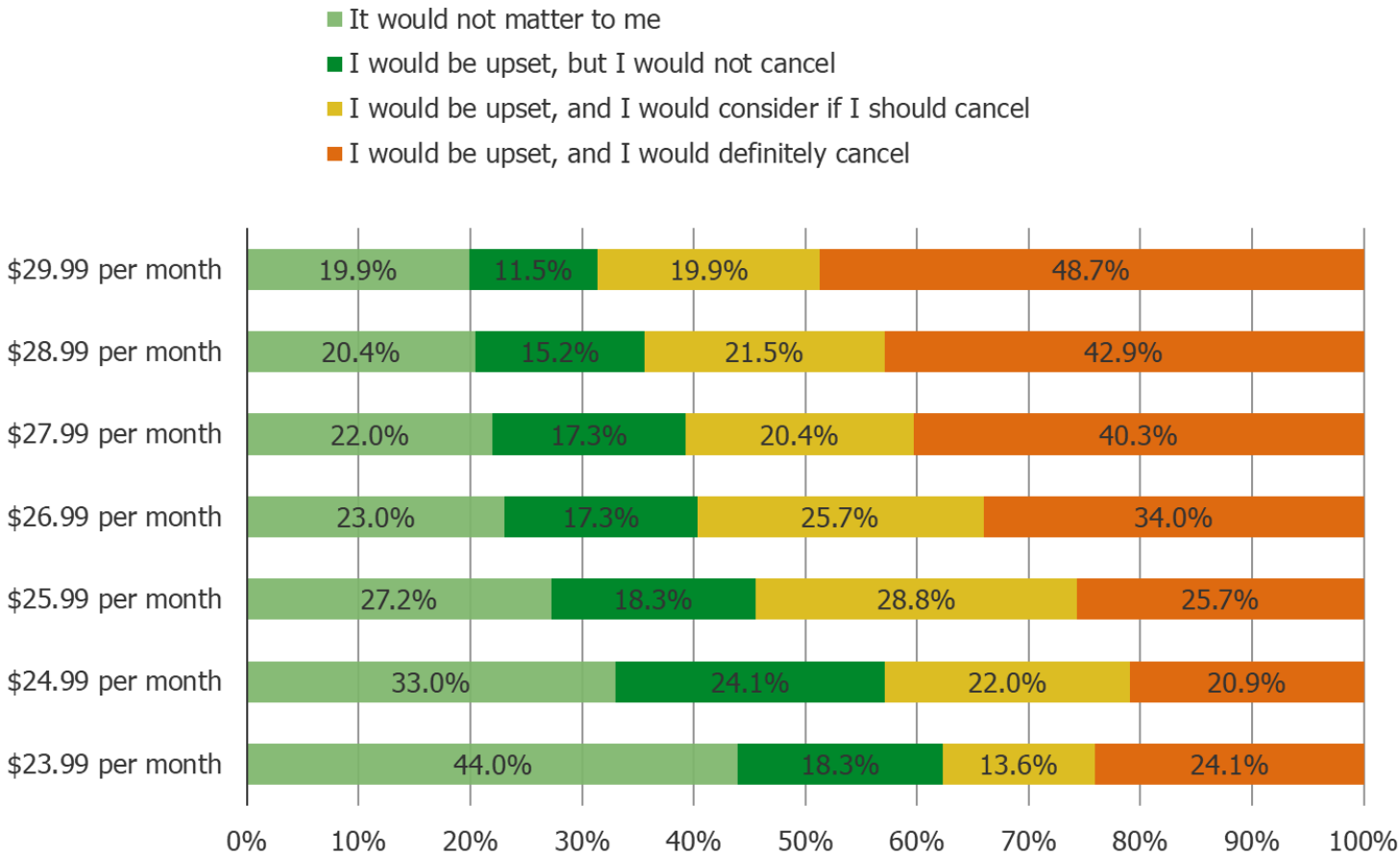
N = 330 (combining results from August, October, and January 2022 to achieve a large N size)

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Audience: 1,250 US Consumers
Date: February 2022

THE PF BLACK CARD MEMBERSHIP CURRENTLY COSTS \$22.99 IF THE PRICE OF THE PF BLACK CARD WAS AS FOLLOWS, WHAT WOULD BEST DESCRIBE YOUR MOST LIKELY RESPONSE?

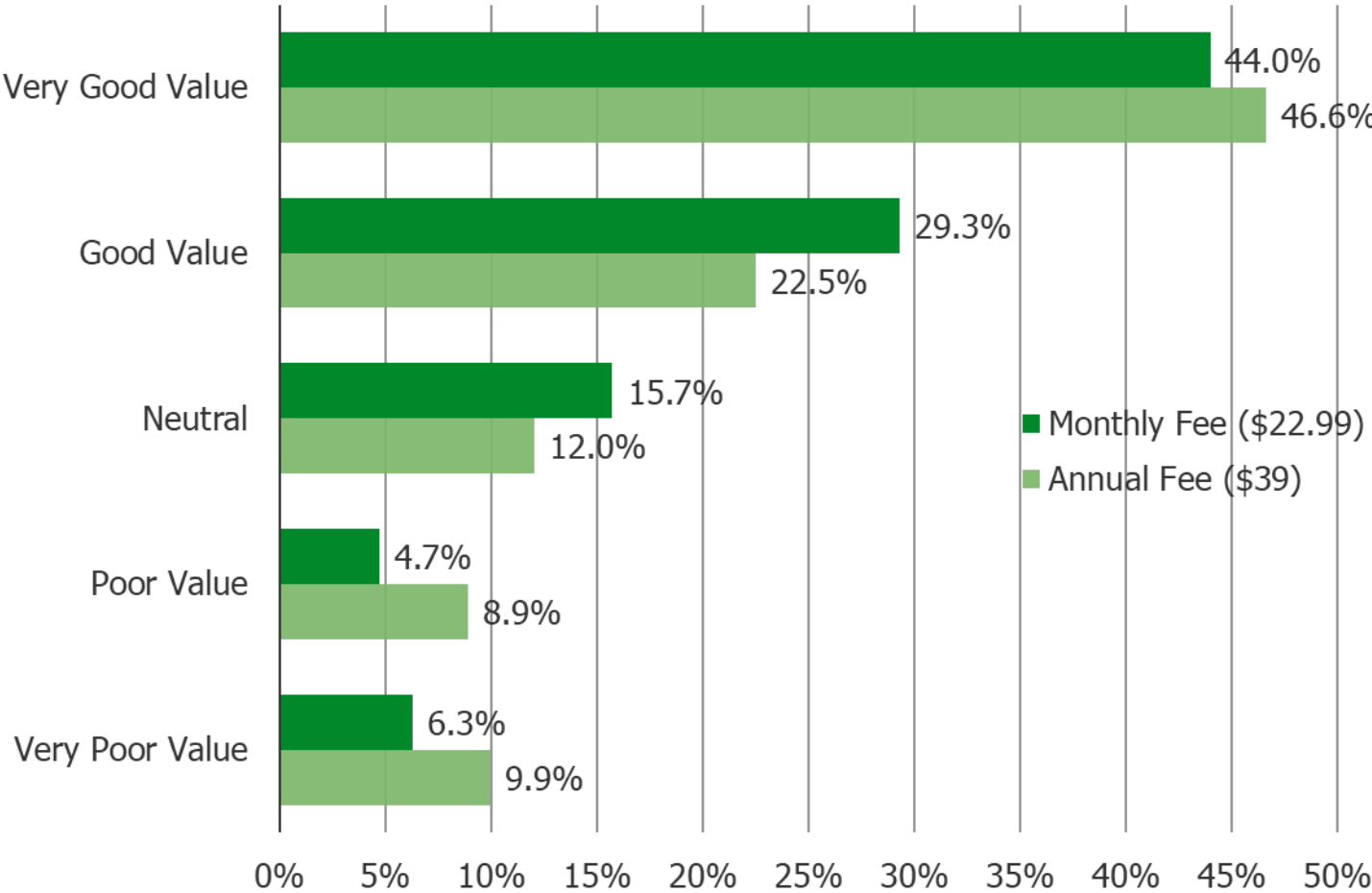
Posed to Planet Fitness members who have the PF Black Card membership.



N = 137 (combining results from August, October, and January 2022 to achieve a large N size)

HOW DO YOU FEEL ABOUT THE VALUE PROPOSITION OF THE PF BLACK CARD MEMBERSHIP?

Posed to Planet Fitness members who have the PF Black Card membership.



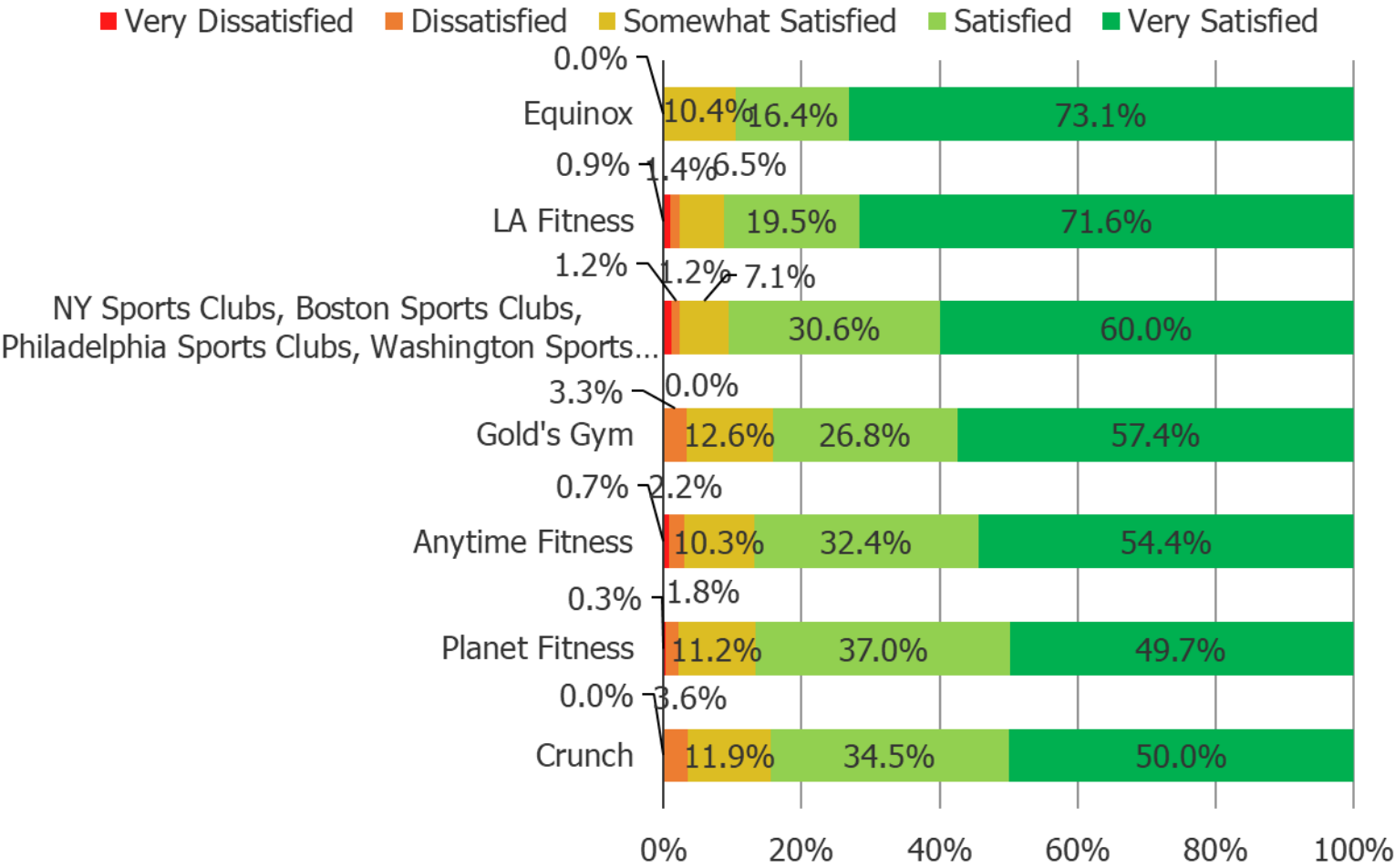
N = 191 (combining results from August, October, and January 2022 to achieve a large N size)

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Audience: 1,250 US Consumers
Date: February 2022

HOW SATISFIED ARE YOU WITH YOUR GYM MEMBERSHIP?

Posed to respondents who are members with each of the following gyms.



	N =
Crunch	84
Planet Fitness	330
Anytime Fitness	136
Gold's Gym	183
NY Sports Clubs, Boston Sports Clubs, Philadelphia Sports Clubs, Washington Sports Clubs	85
LA Fitness	215
Equinox	67

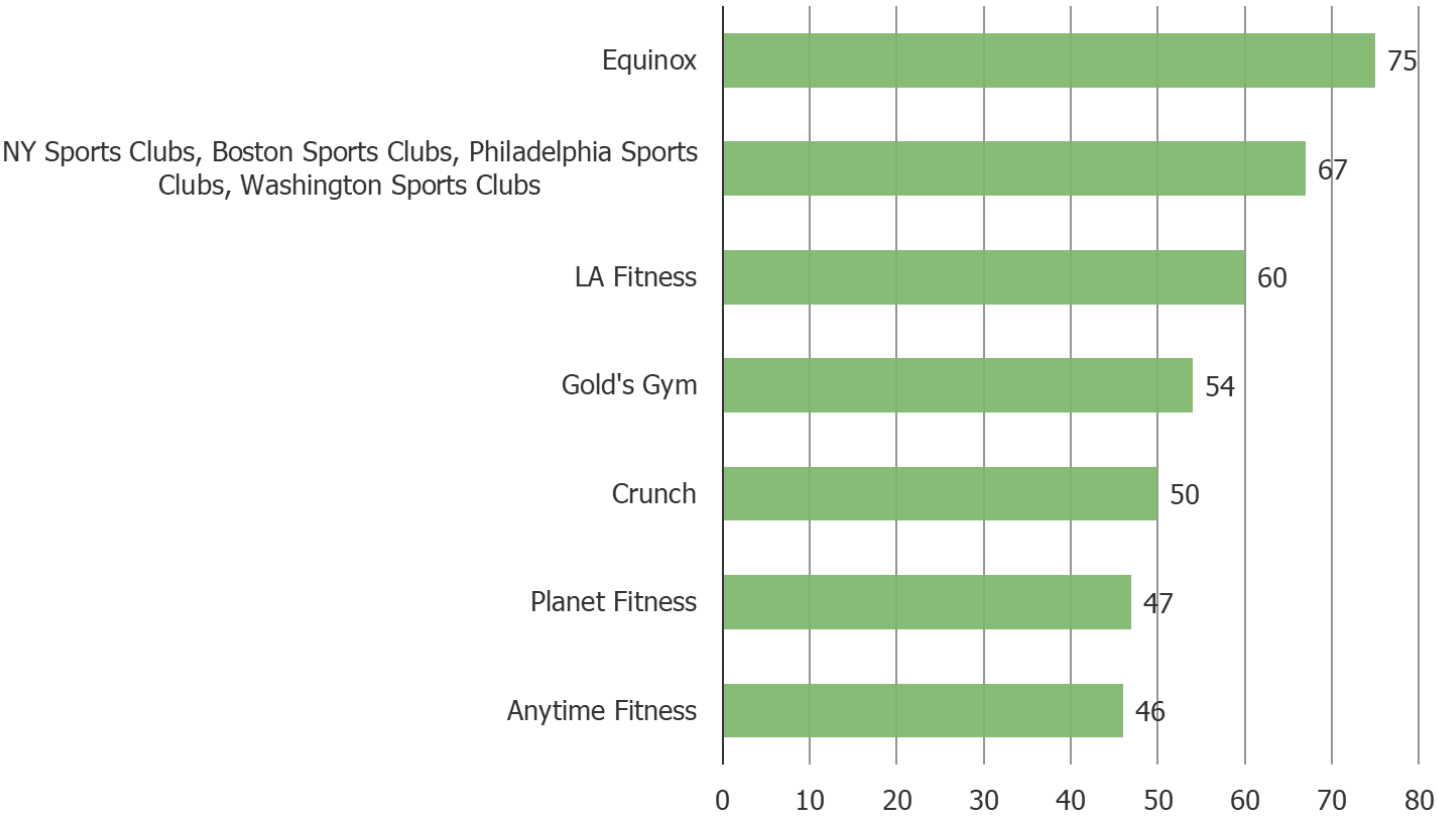
*Combining results from August, October, and January 2022 to achieve a large N sizes.

No Pain. No Gain.

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Date: February 2022

HOW LIKELY ARE YOU TO RECOMMEND THE FOLLOWING TO A FRIEND OR COLLEAGUE?

Posed to members of the below.



	N =
Crunch	84
Planet Fitness	330
Anytime Fitness	136
Gold's Gym	183
NY Sports Clubs, Boston Sports Clubs, Philadelphia Sports Clubs, Washington Sports Clubs	85
LA Fitness	215
Equinox	67

*Combining results from August, October, and January 2022 to achieve a large N sizes.

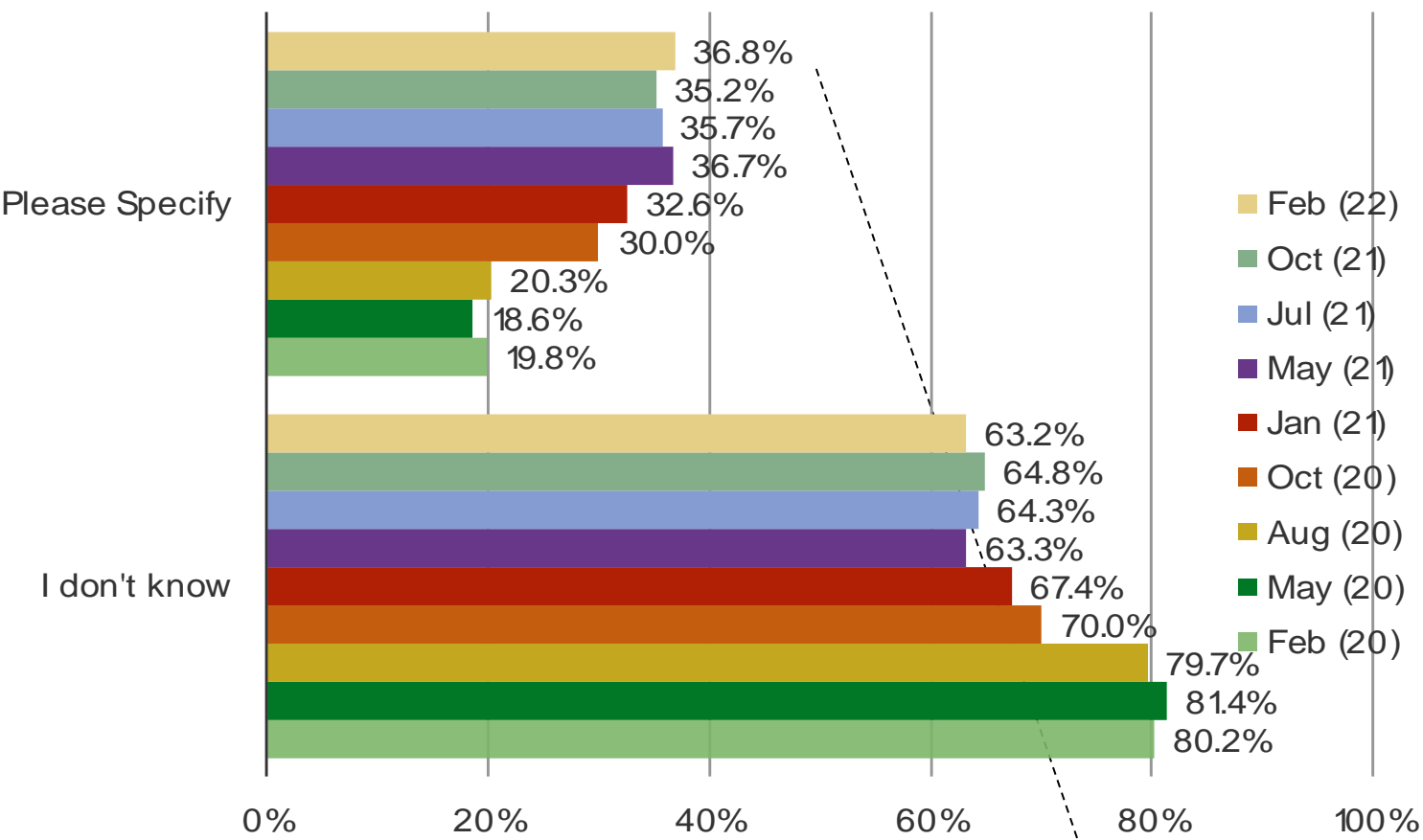
AT-HOME FITNESS

Posed to respondents who exercise



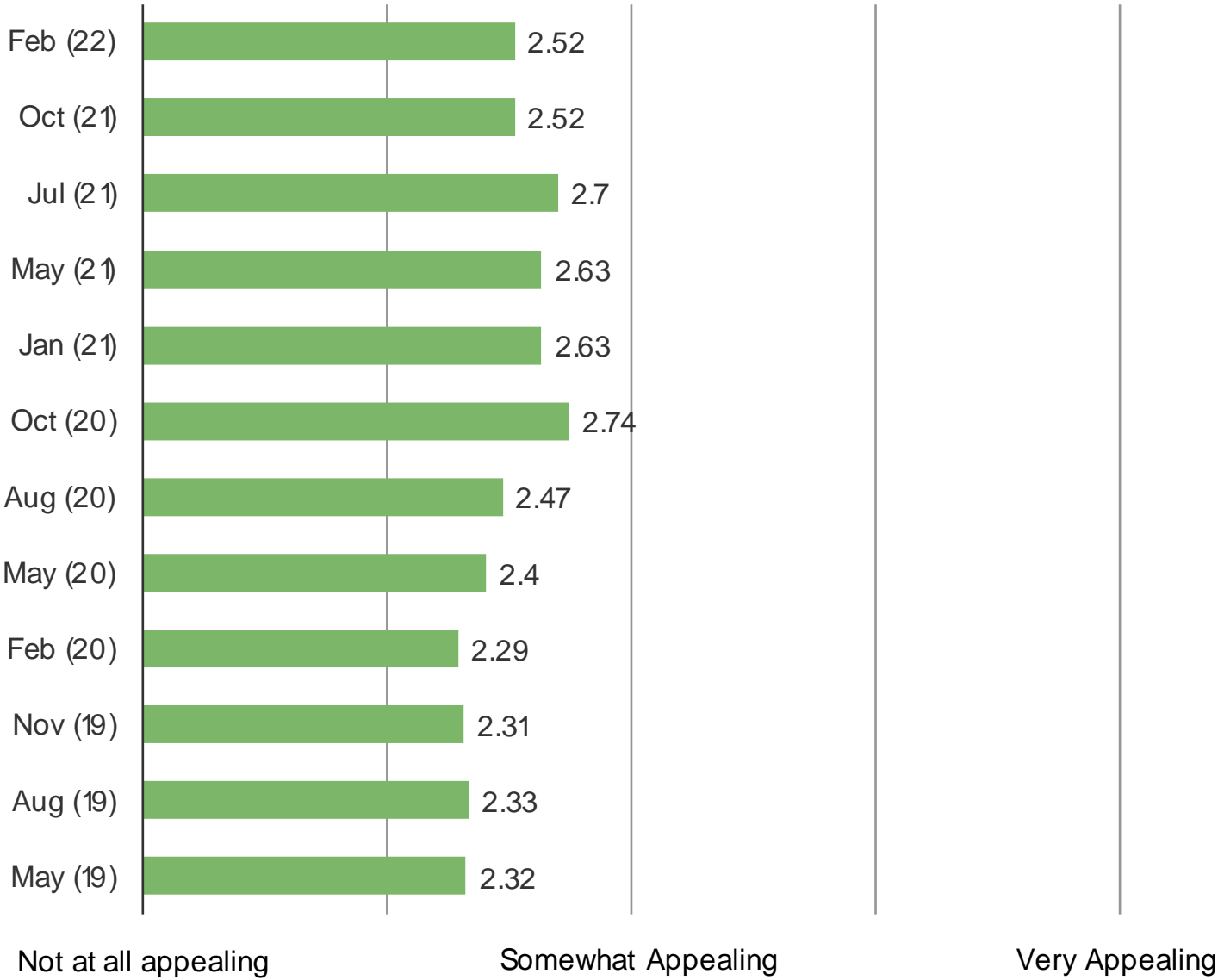
WHEN YOU THINK OF AT-HOME FITNESS BRANDS, WHICH COMES TO MIND FIRST?

Posed to respondents who exercise



WOULD YOU FIND IT APPEALING TO BE ABLE TO PARTICIPATE IN AN EXERCISE CLASS ENVIRONMENT WHERE YOU WATCH A LIVE INSTRUCTOR AND COMPETE AGAINST OTHER PEOPLE FROM YOUR OWN HOME?

Posed to all respondents

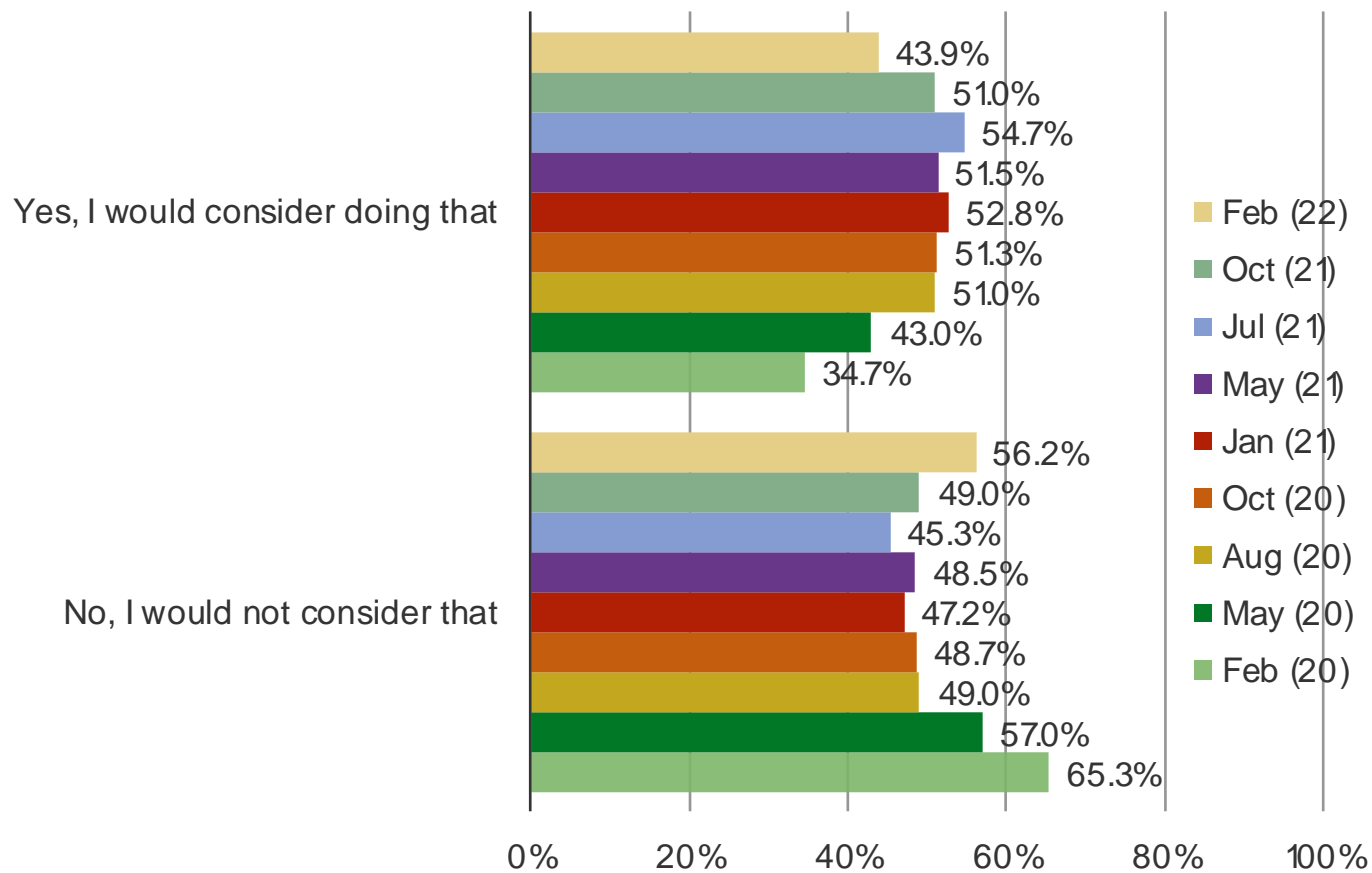


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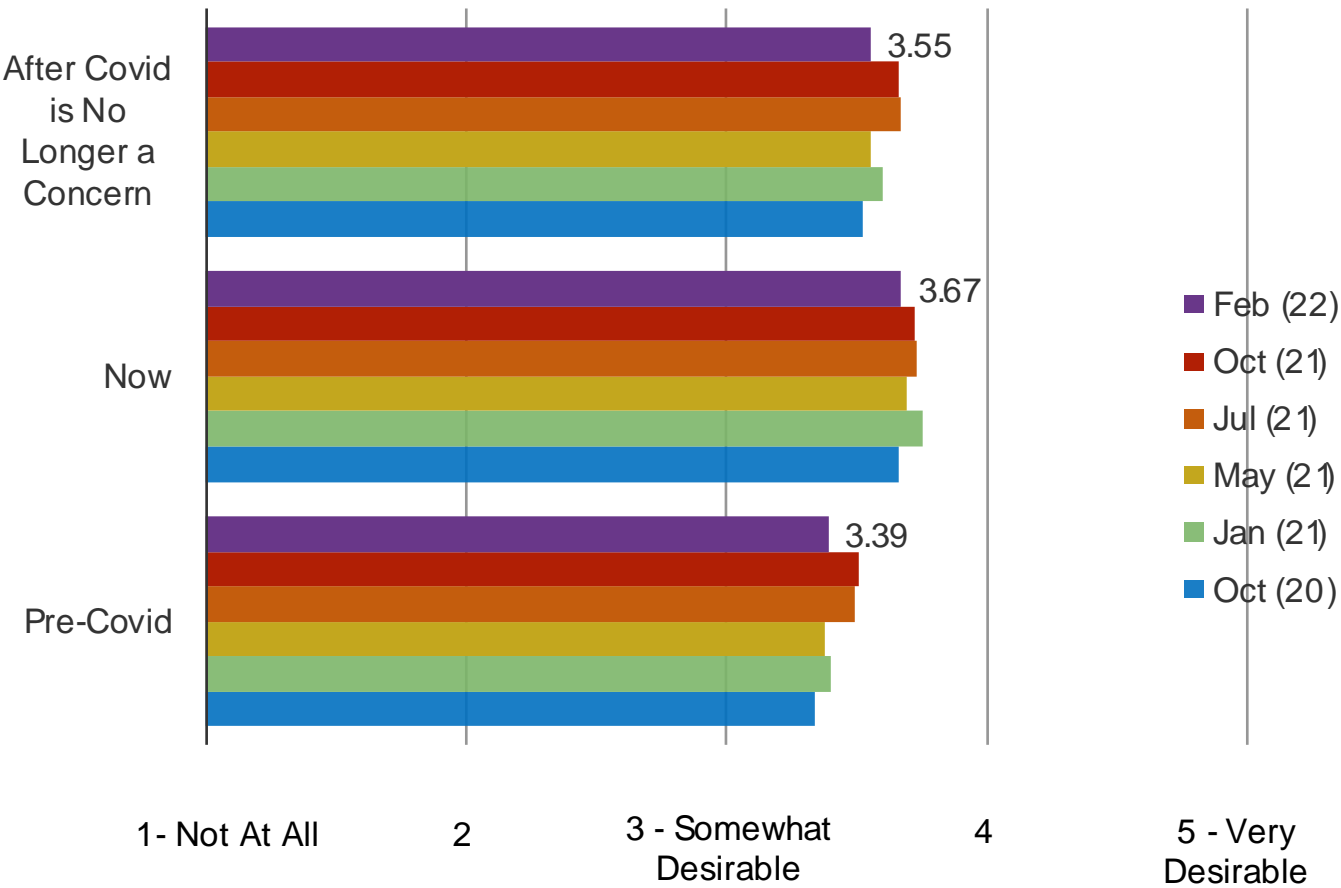
WOULD YOU CONSIDER DROPPING YOUR GYM MEMBERSHIP TO USE ONLY IN-HOME EXERCISE EQUIPMENT?

Posed to respondents WITH gym memberships



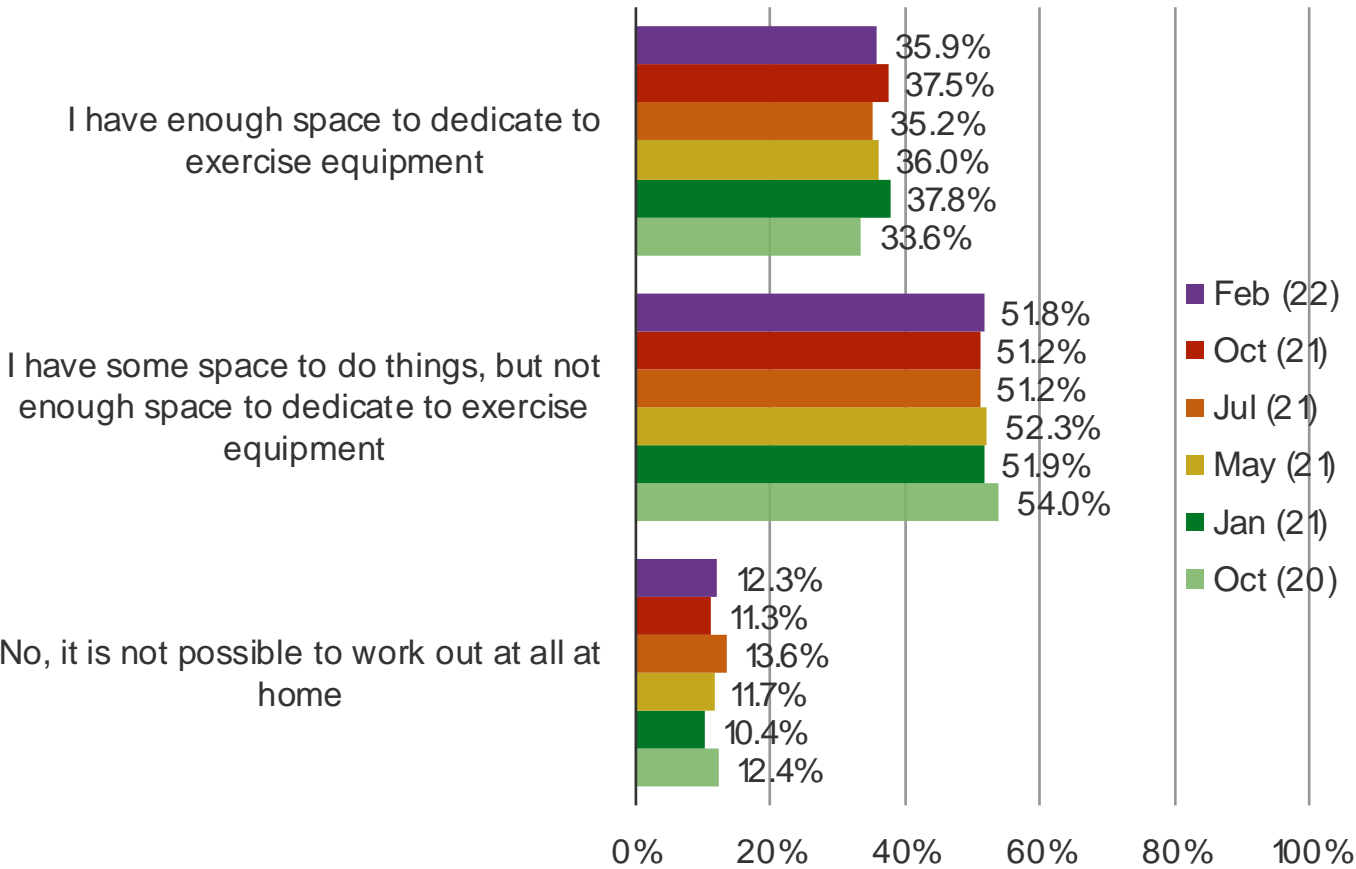
PLEASE RATE HOW DESIRABLE YOU WOULD FIND IT TO EXERCISE AT HOME?

Posed to current gym members.



DO YOU HAVE THE SPACE IN YOUR HOME TO WORK OUT AT HOME?

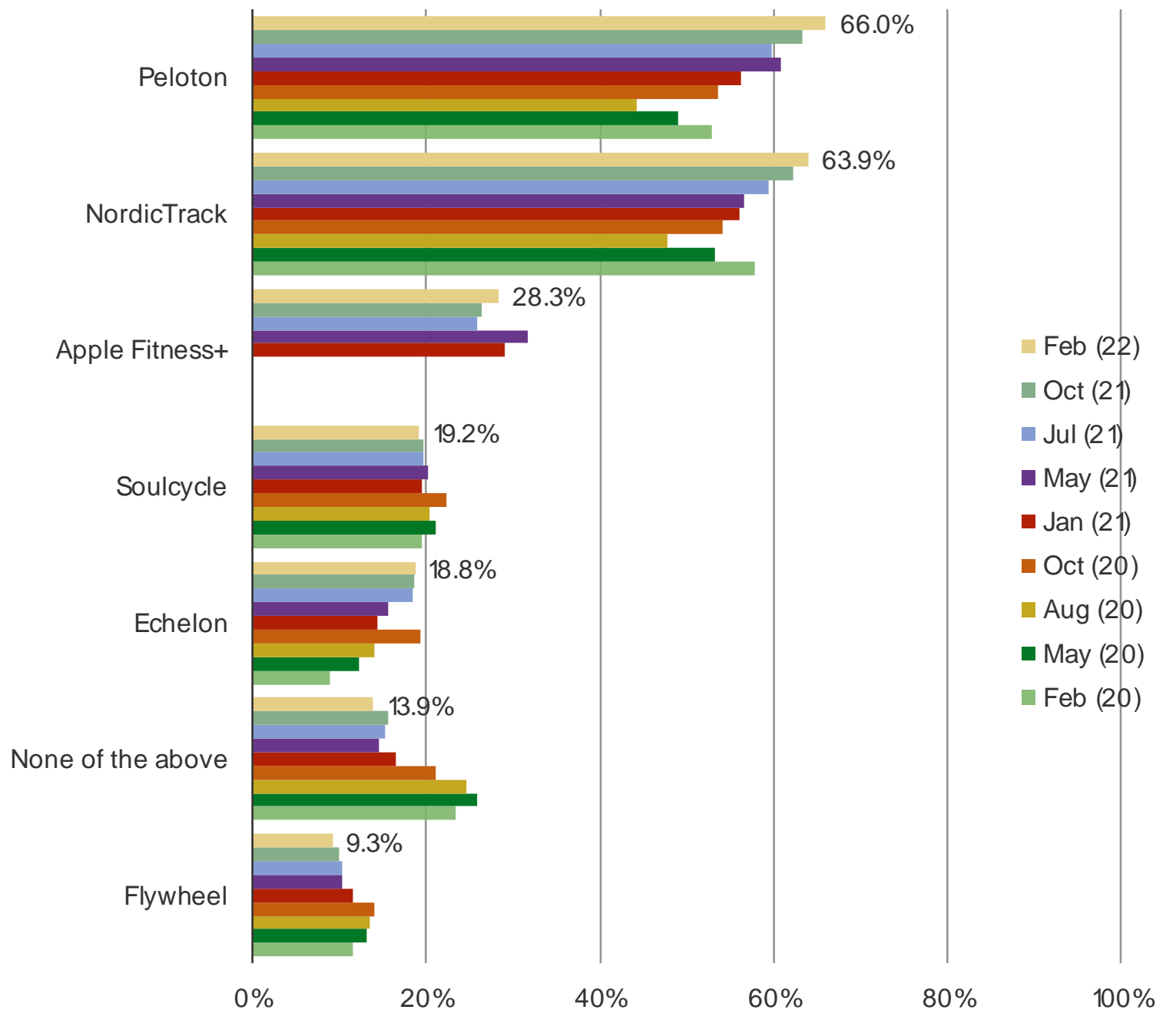
Posed to current gym members.



AT-HOME FITNESS BRANDS

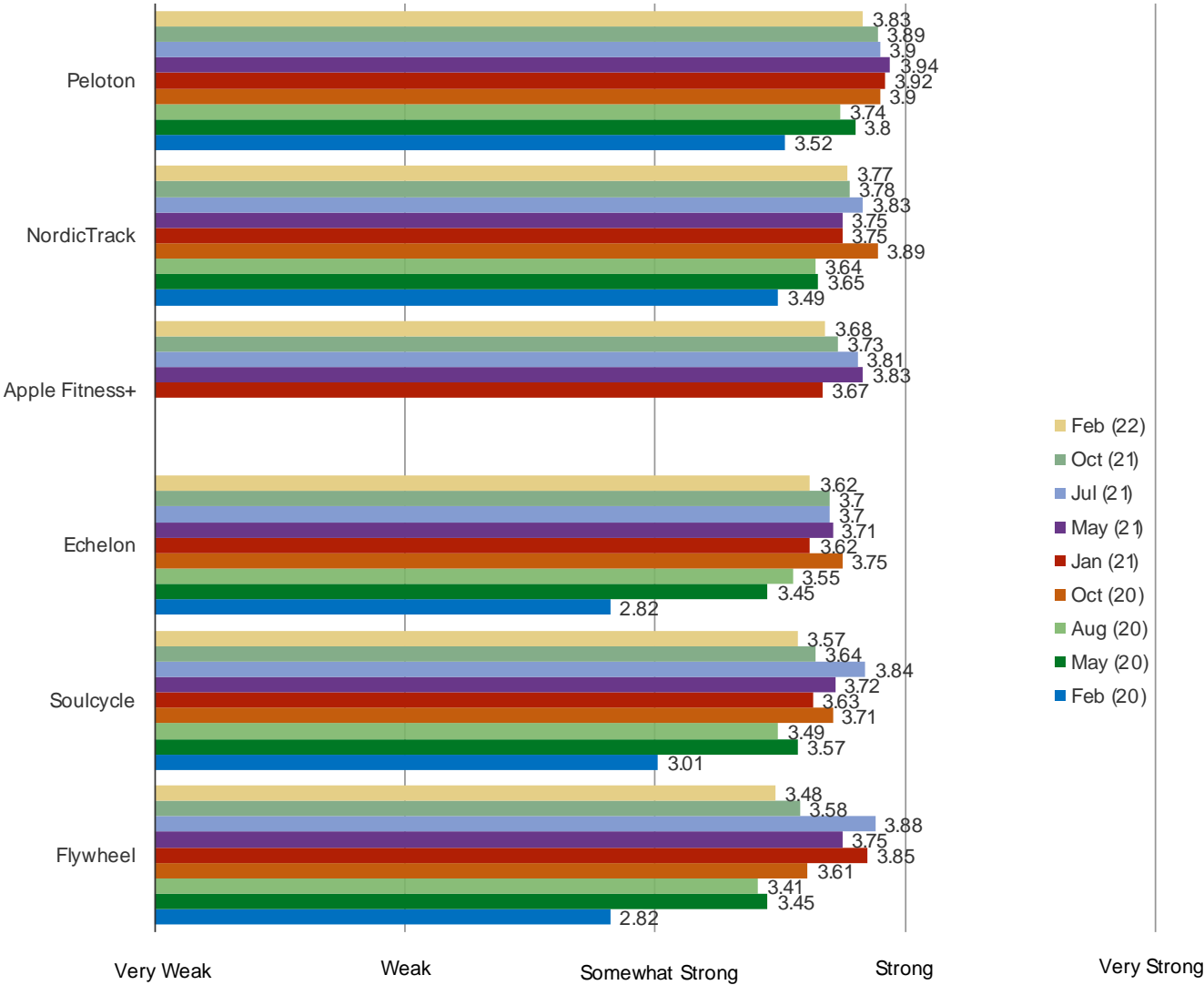
HAVE YOU HEARD OF ANY OF THE FOLLOWING?

Posed to all respondents



HOW STRONG OF A “FITNESS BRAND” DO YOU CONSIDER THE FOLLOWING TO BE?

Posed respondents who have heard of the following fitness brands

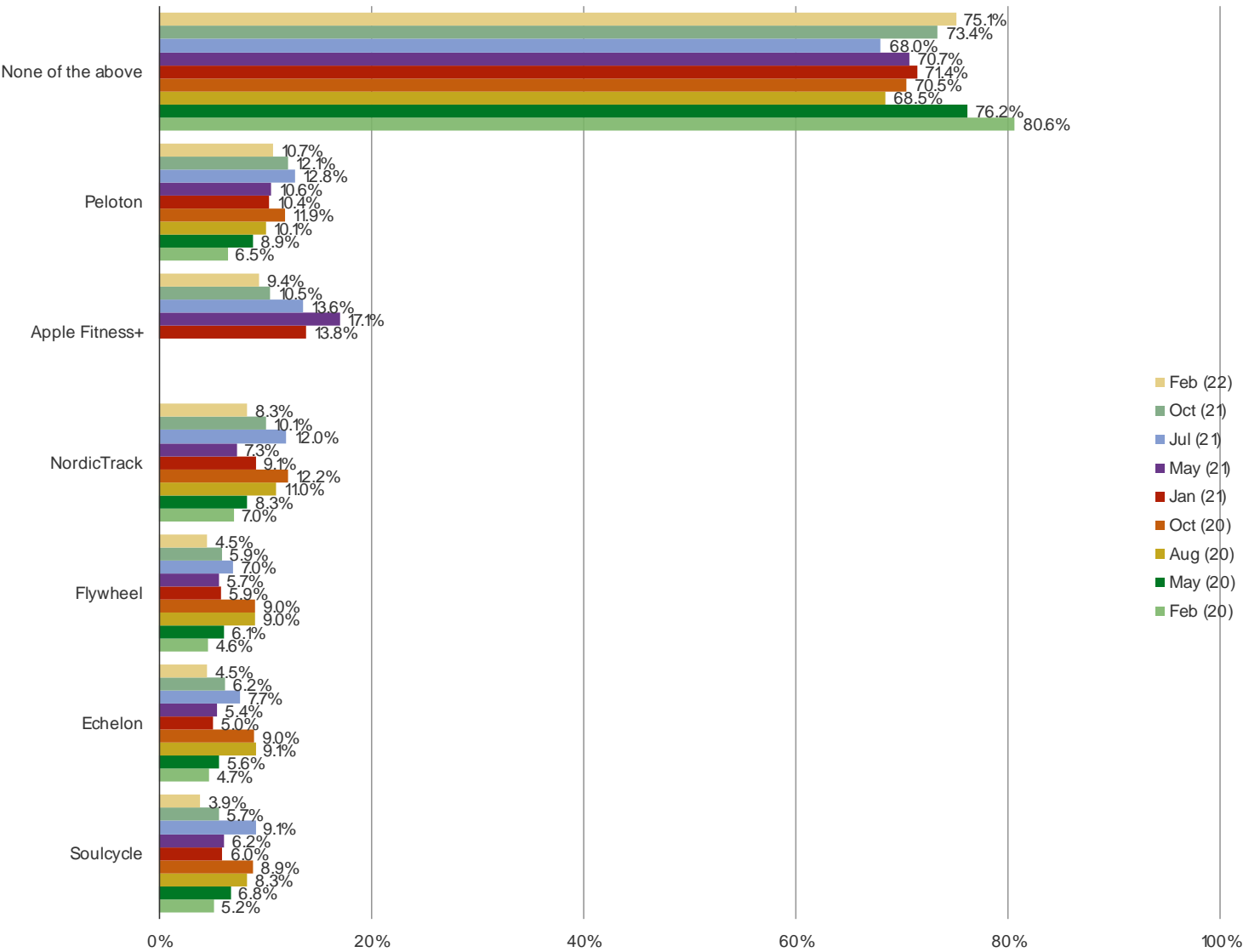


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Date: February 2022

DO YOU CURRENTLY OWN PRODUCTS OR SUBSCRIBE/PAY FOR APPS OR CLASSES FROM ANY OF THE FOLLOWING? (SELECT ALL THAT APPLY)

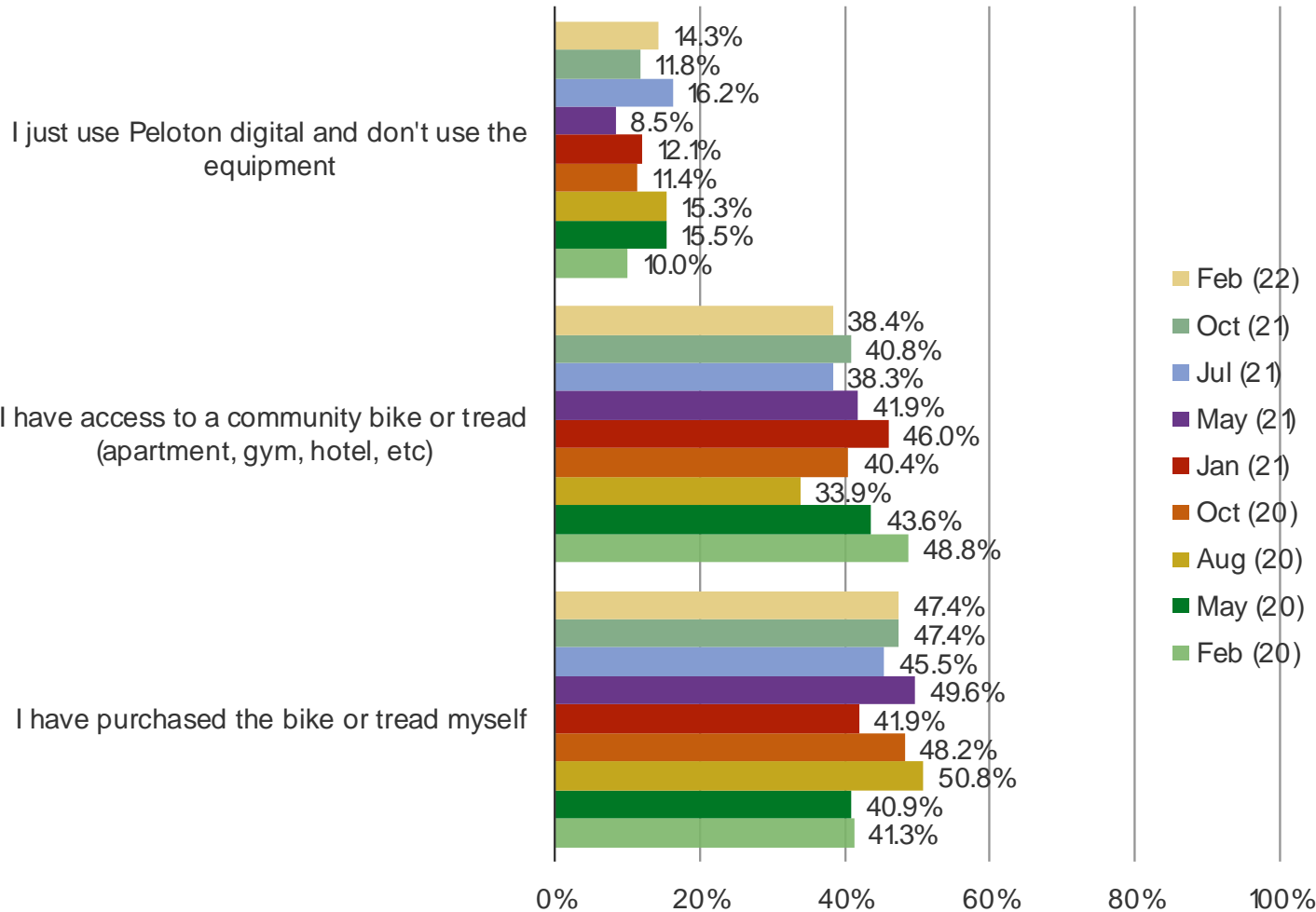
Posed to all respondents



PELOTON CUSTOMERS

WHICH OF THE FOLLOWING BEST DESCRIBES YOUR USAGE OF PELOTON?

Posed to Peloton owners

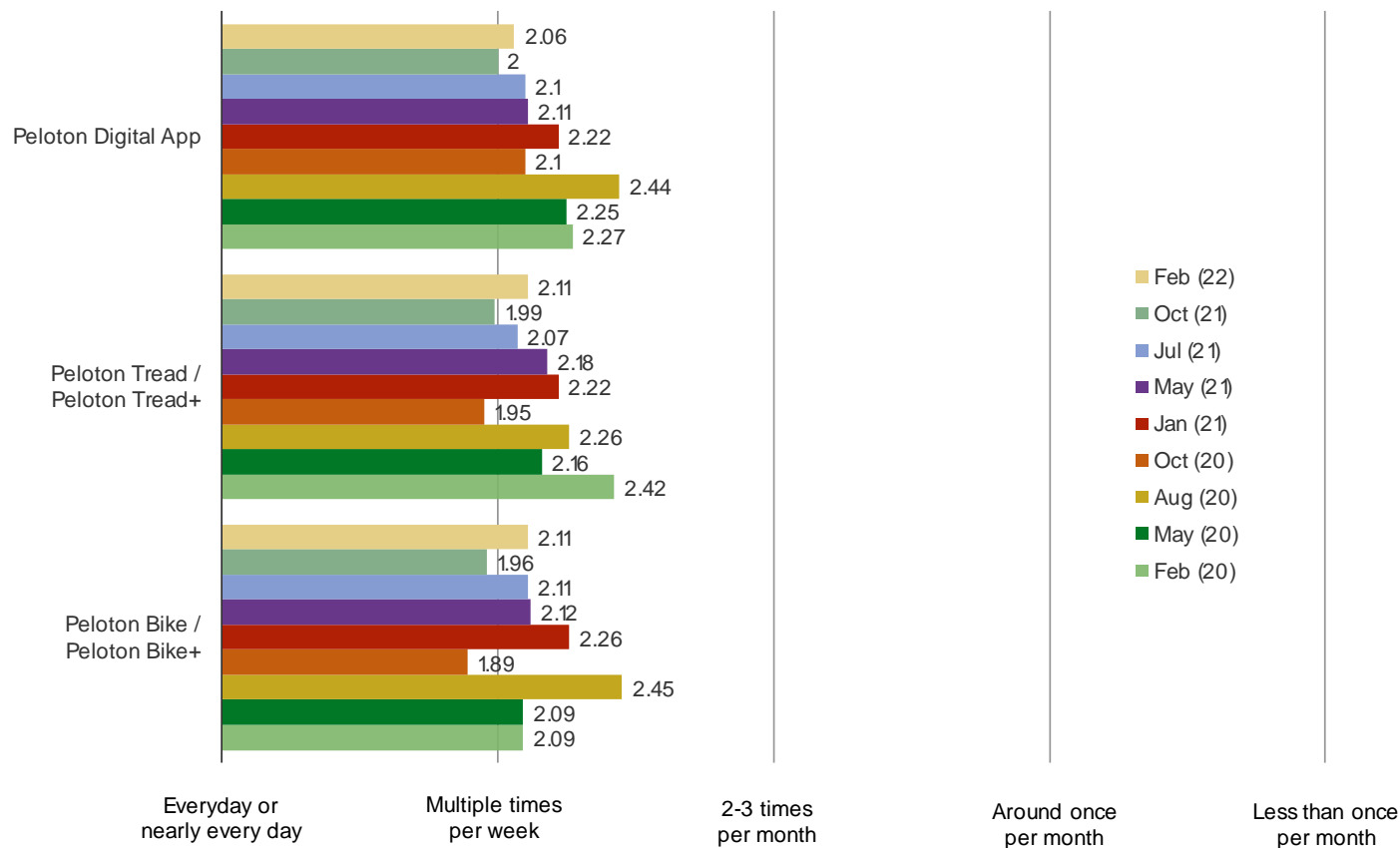


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HOW OFTEN DO YOU USE THE FOLLOWING?

Posed to Peloton owners or subscribers (either owns equipment or accesses shared equipment). | N = ~127

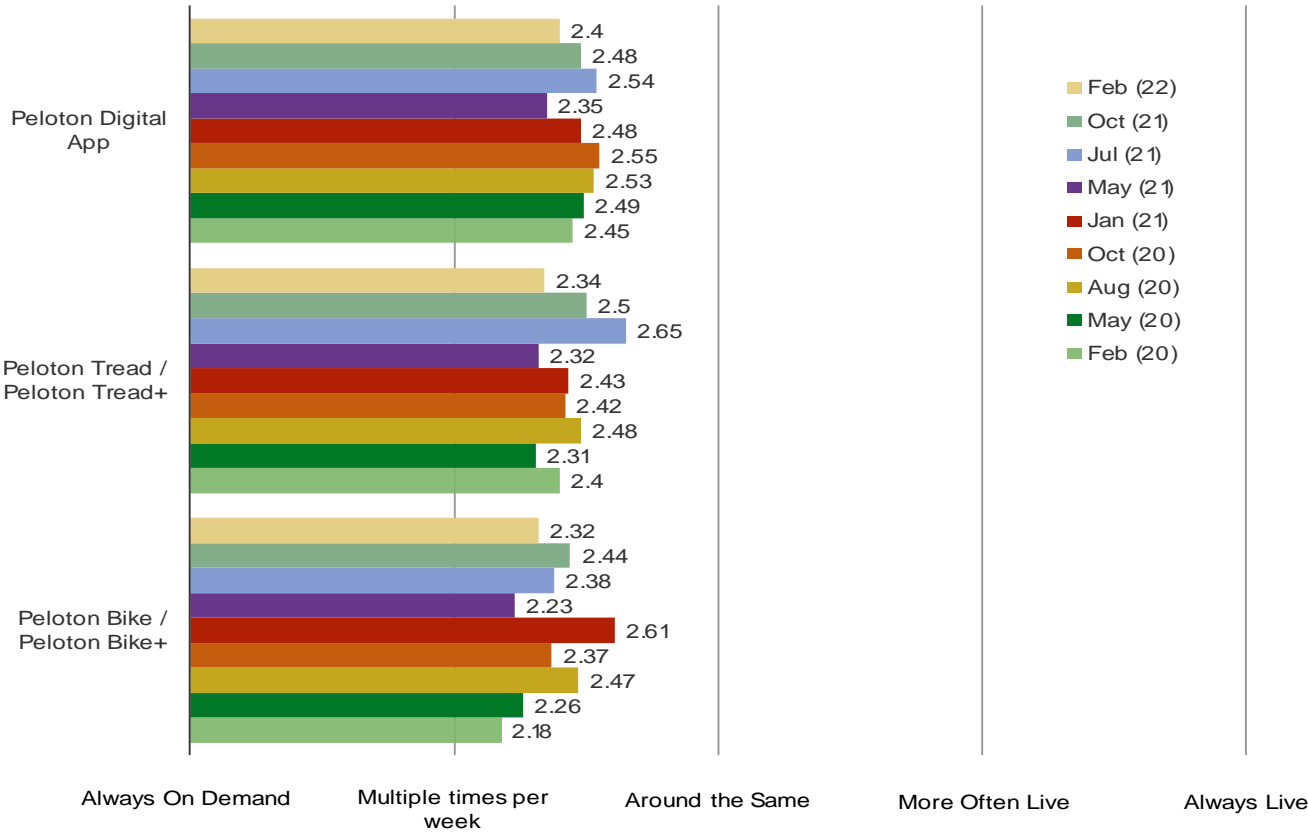


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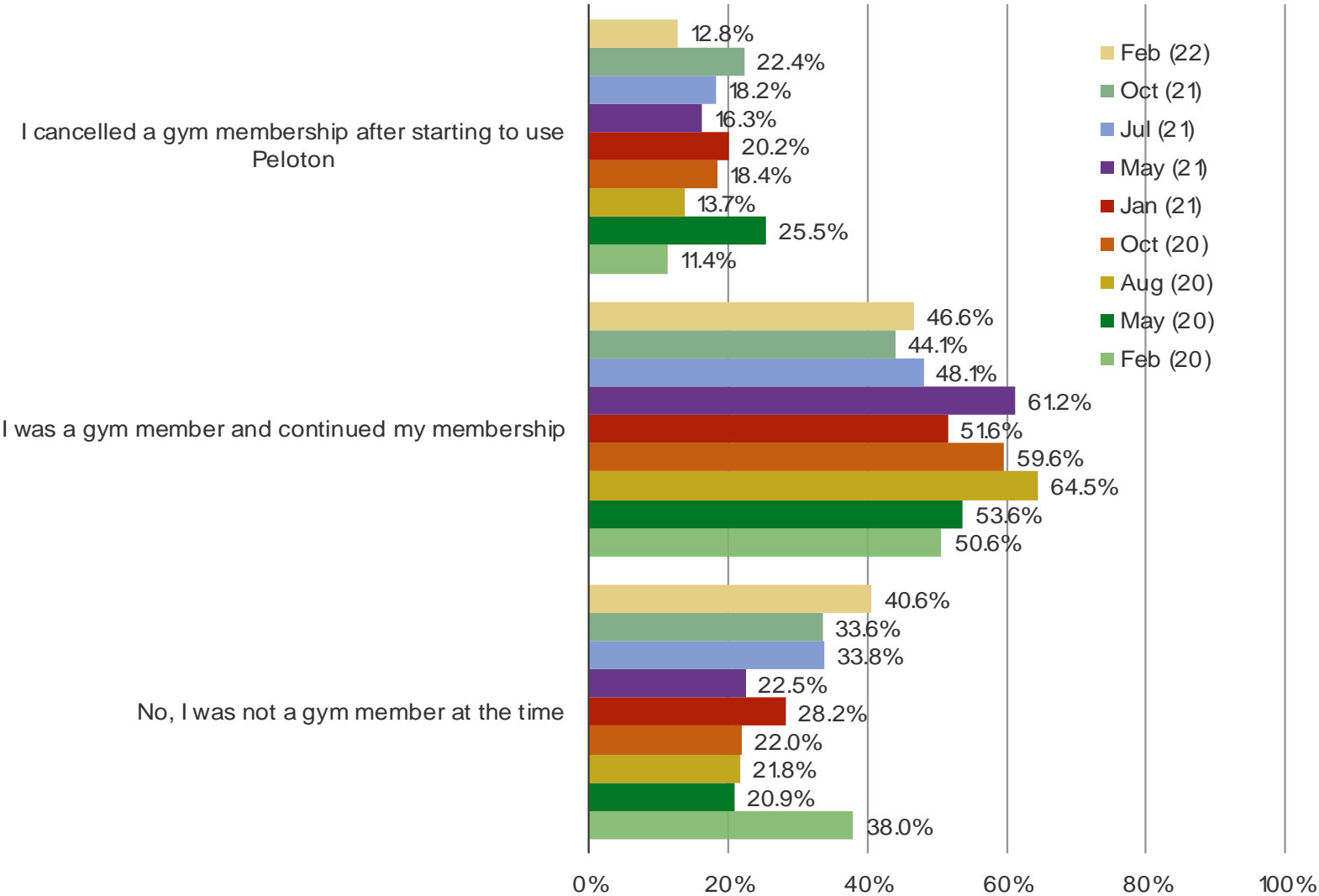
HOW OFTEN DO YOU TAKE LIVE CLASSES VS. ON DEMAND?

Posed to Peloton owners or subscribers (either owns equipment or accesses shared equipment). N = ~127



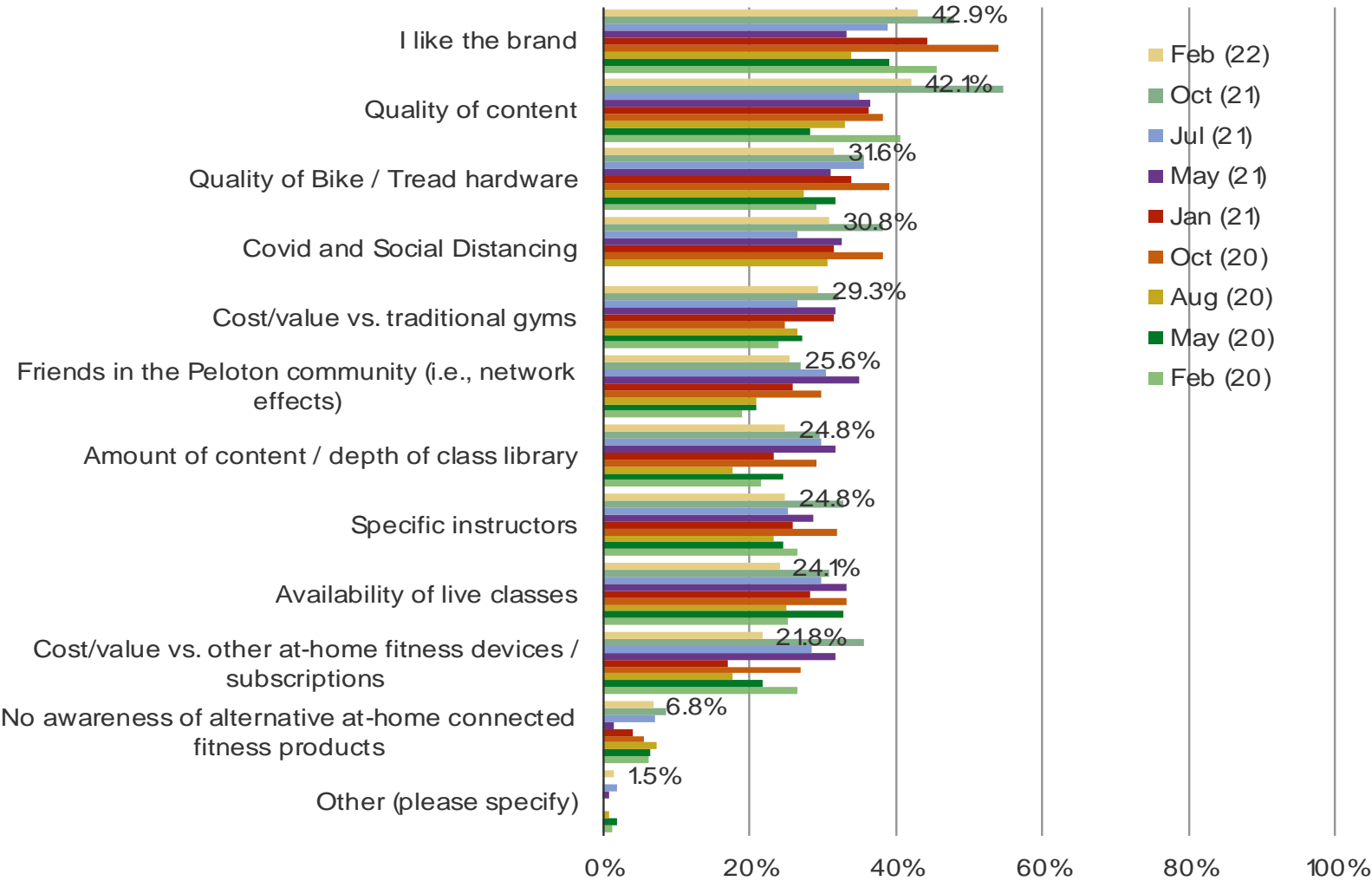
DID YOU CANCEL A GYM MEMBERSHIP AFTER YOU STARTED USING PELOTON?

Posed to Peloton owners or subscribers (either owns equipment or accesses shared equipment).



WHAT WERE THE MOST IMPORTANT REASONS FOR WHY YOU ORIGINALLY PURCHASED PELOTON EQUIPMENT?

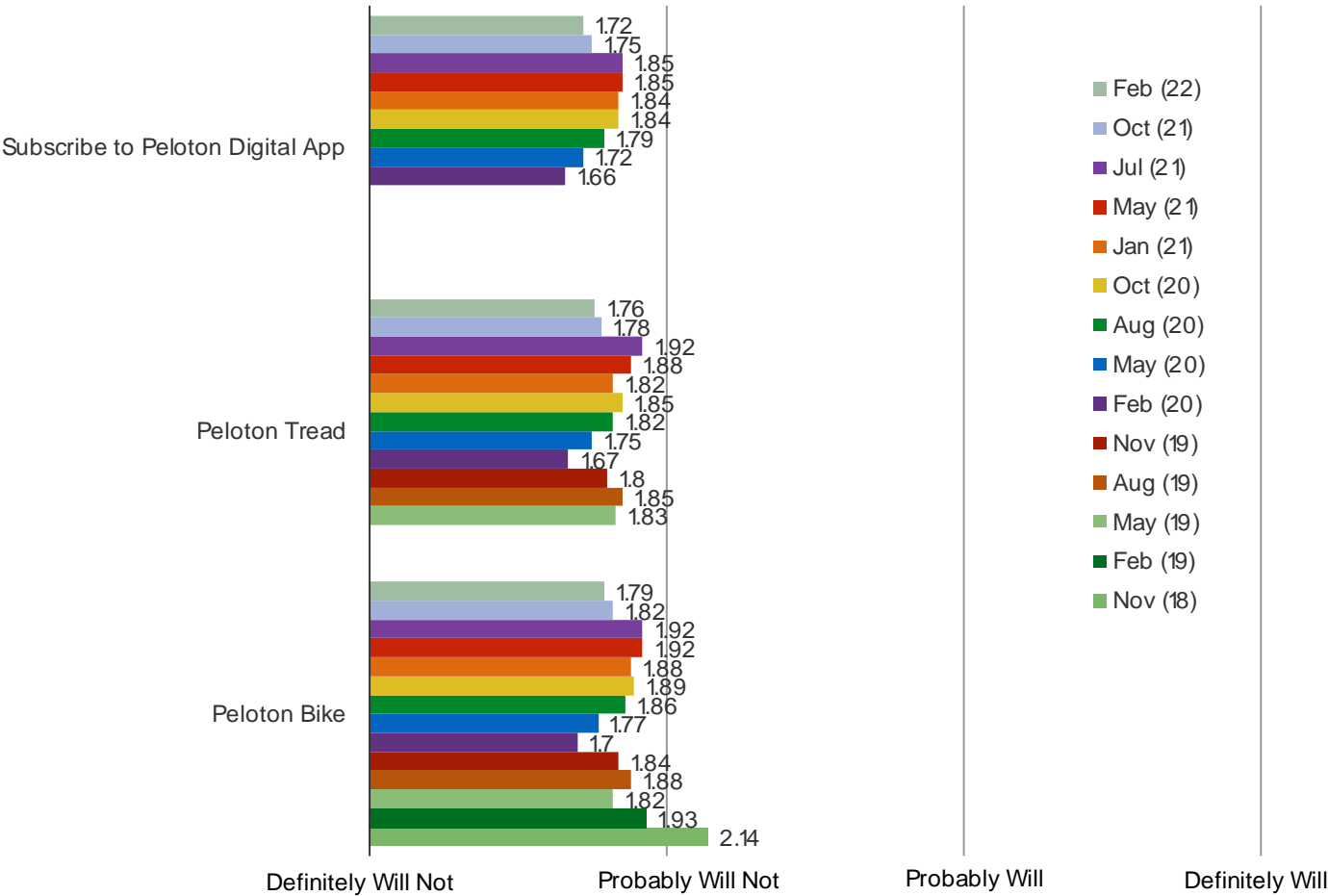
Posed to Peloton owners or subscribers (either owns equipment or accesses shared equipment).



NON PELOTON CUSTOMERS

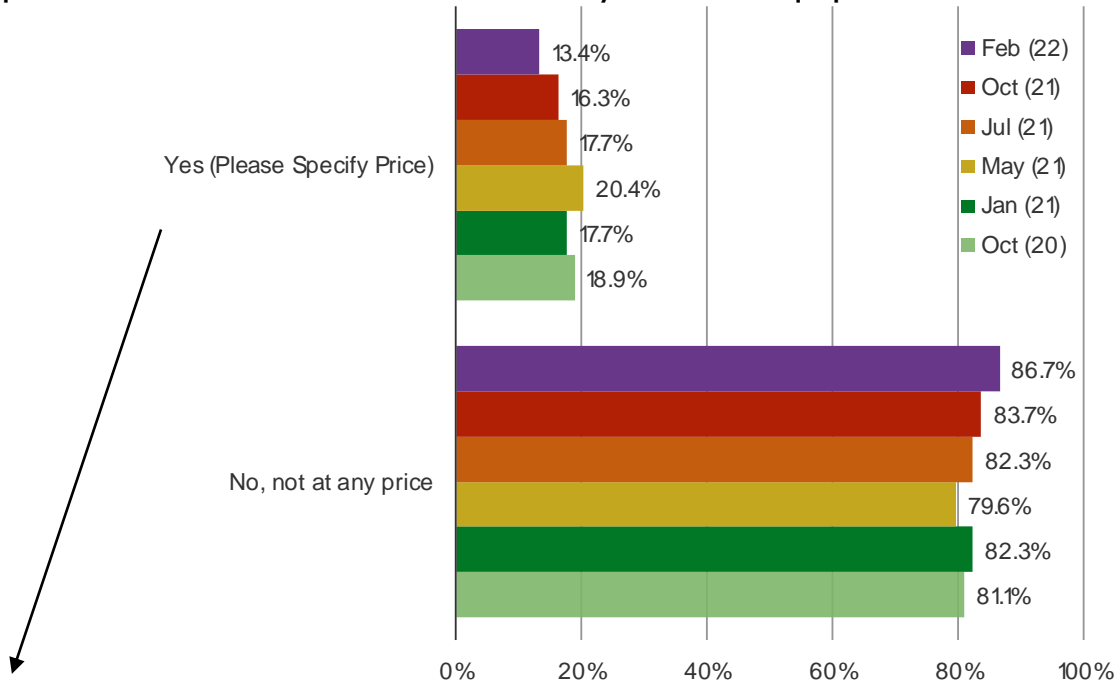
HOW LIKELY ARE YOU TO BUY THE PELOTON EQUIPMENT IN THE FUTURE OR SIGN UP FOR THE DIGITAL APP?

Posed to respondents who do not own any Peloton equipment.



IS THERE A LOWER PRICE POINT THAT WOULD MAKE THE PELOTON BIKE OF INTEREST TO YOU?

Posed to respondents who do not own or use any Peloton equipment.



Respondents who filled in an amount (under current prices):

Oct (21)

Average: \$676.41

Median: \$700

Jul (21)

Average: \$747

Median: \$700

May (21)

Average: \$771

Median: \$800

Jan (21)

Average: \$742.03

Median: \$800

Oct (20)

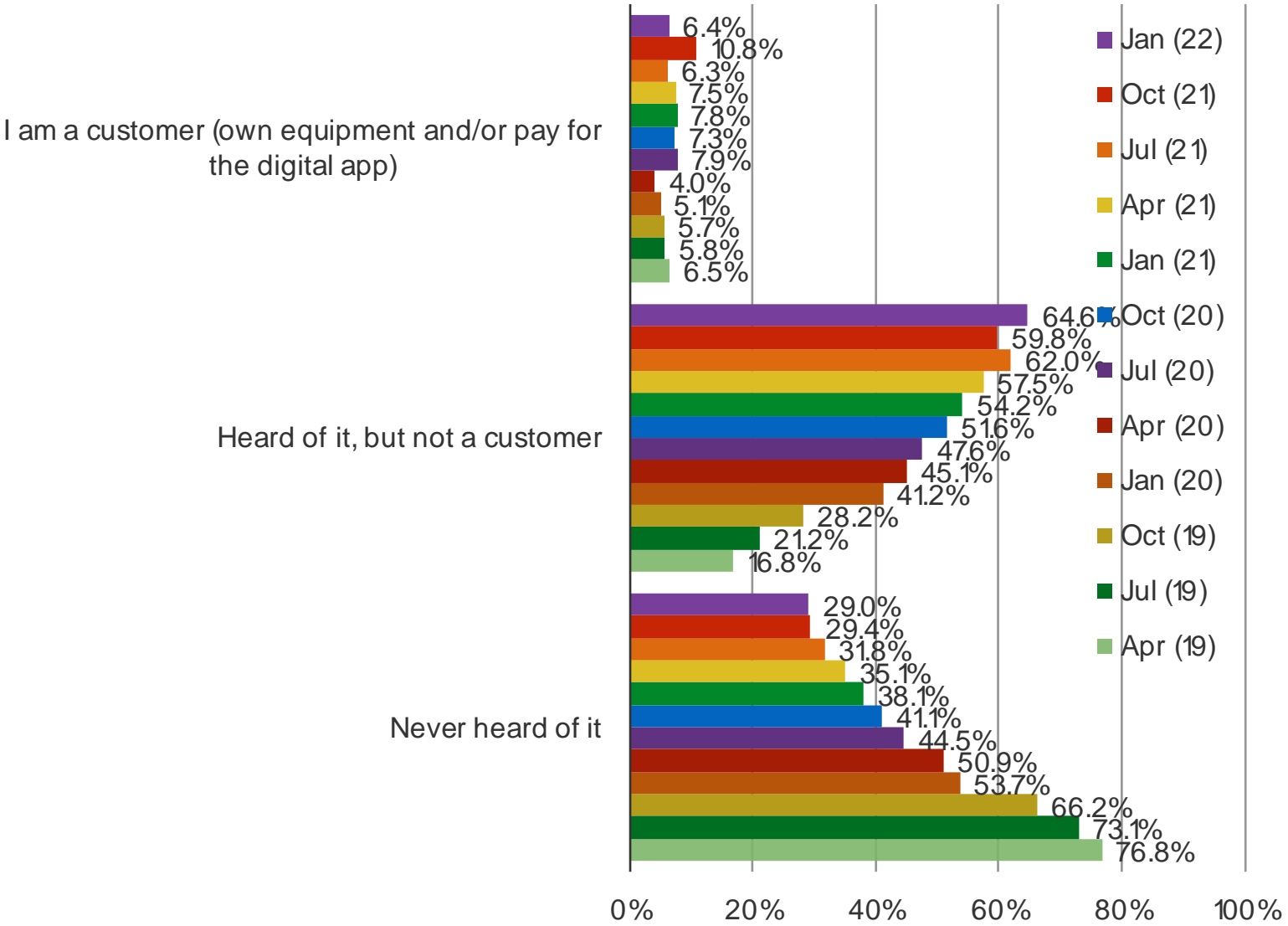
Average: \$740.89

Median: \$800

PELTON IN THE UK

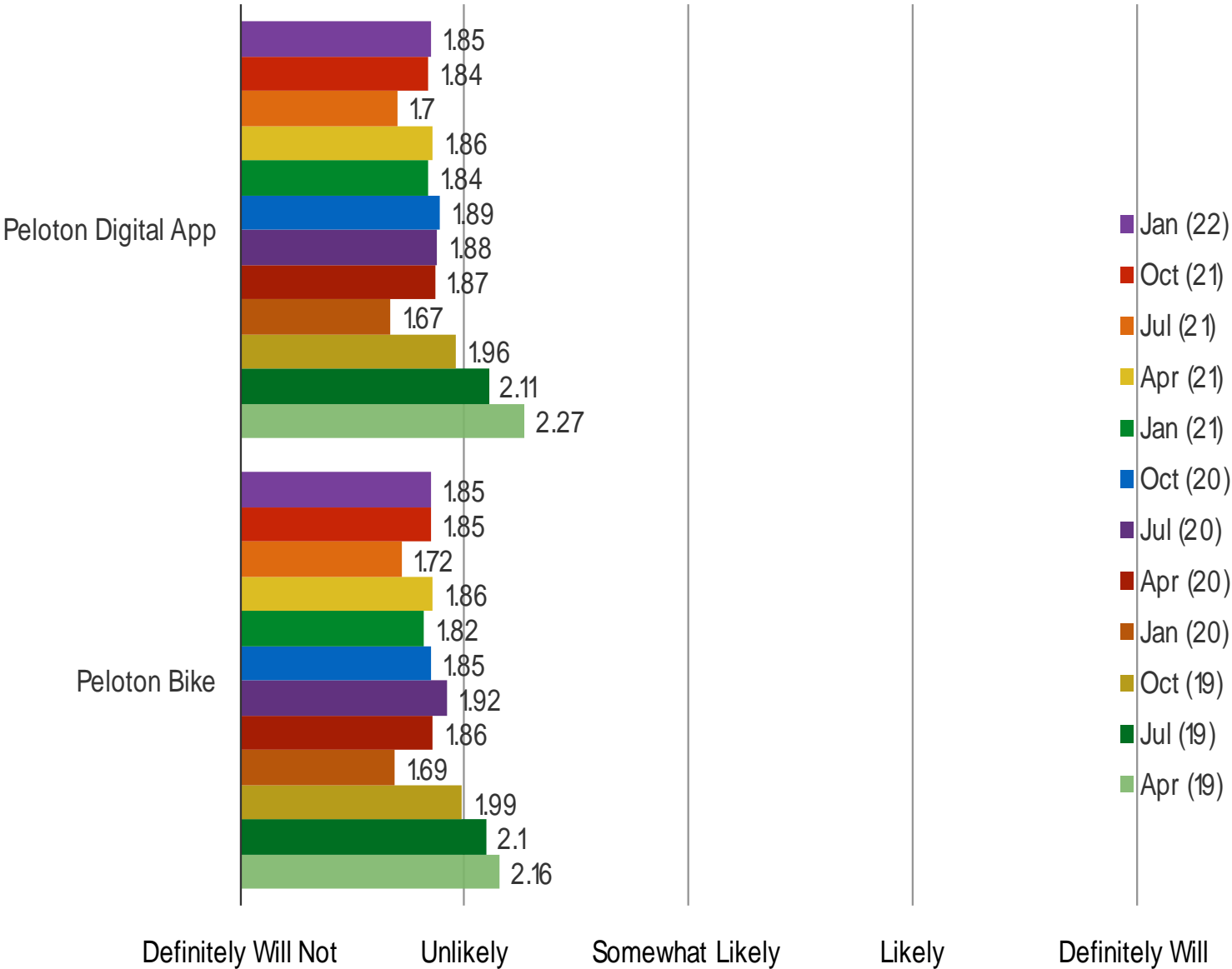
WHAT IS YOUR EXPERIENCE WITH PELOTON?

Posed to all respondents.



HOW MUCH INTEREST DO YOU HAVE IN THE FOLLOWING?

Posed to respondents who are aware of Peloton but do not own any Peloton equipment.



HOW OFTEN DO YOU EXERCISE?

Posed to all respondents.

