



# MVPs: THE NEW POWER PLAYERS IN CLUB GROWTH

***LES MILLS***

1. INTRODUCTION
2. CLUB ECONOMICS
3. KEY FINDINGS
4. MVP ACTION PLAN
5. METHODOLOGIES



# INTRODUCTION





# INTRODUCTION

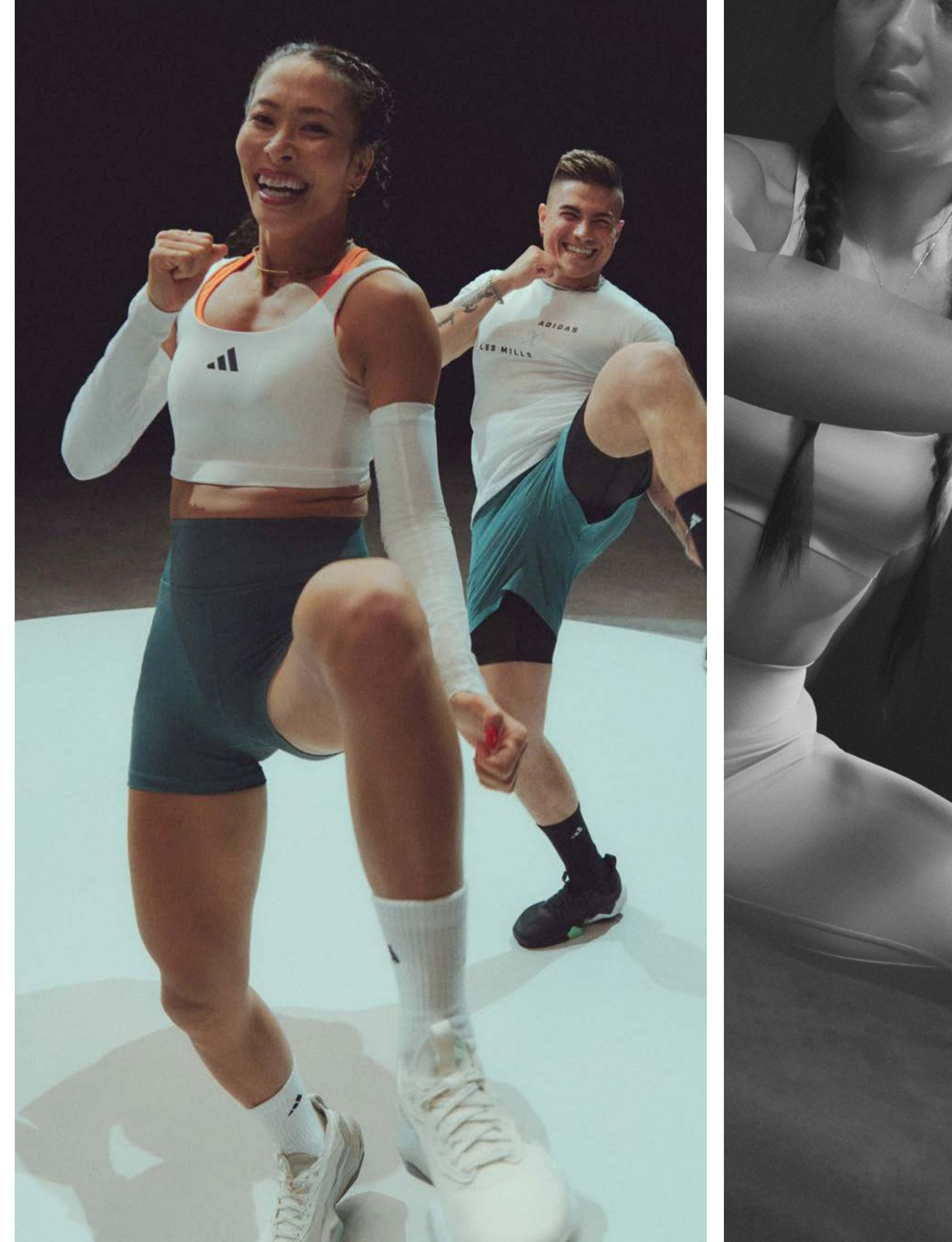
**As the fitness market matures, growth is becoming less exponential and more incremental, forcing operators to work harder than ever to earn their share of the spoils. Clubs with the best strategy and execution are the ones pulling away from the rest of the pack.**

The European fitness market's total revenue grew by 10% in 2024, but the largest 20 operators increased revenue by an average of 15% (2025 European Health and Fitness Market Report).

A well-defined strategy provides a framework for making informed choices, ensuring they align with your overall goals and long-term vision. Clubs have fixed overheads and capacity, so every decision an operator makes will have a positive or negative impact on profitability. From the floorplan, to the timetable and marketing approach, every choice matters.

But it's the people who make a club truly great, and the makeup of your members is one of the biggest determinants of success. In sport, MVPs are the difference makers – the margin between success and failure. In gyms, MVPs are your Most Valuable Participants, with the potential to transform a business.

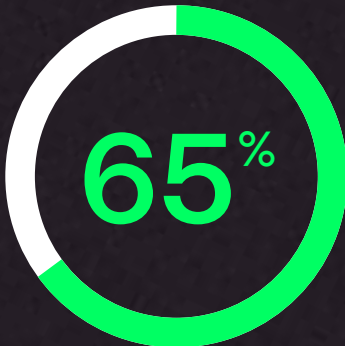
By working with independent fitness data experts ROR Partners and 4GLOBAL to analyze 2.6 million member journeys across the US and Europe, we've discovered that MVPs attend their club more often, stay longer, and have a higher lifetime value (LTV) than any other member category. They're the key to a more profitable business, and this report offers a bulletproof playbook for packing your club with them.



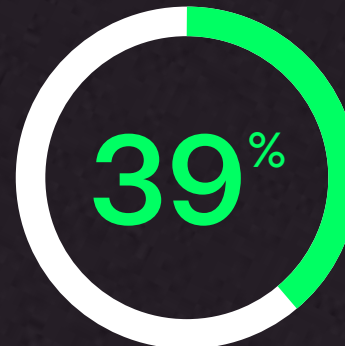


# THE MVP (MOST VALUABLE PARTICIPANT) EFFECT

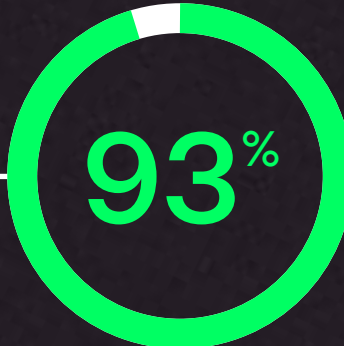
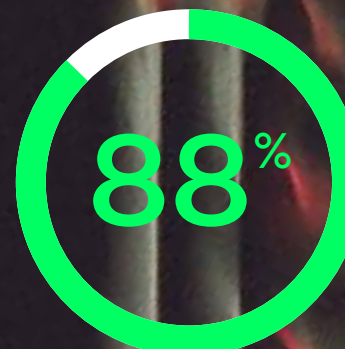
MVPs visit their club 65% more than other members



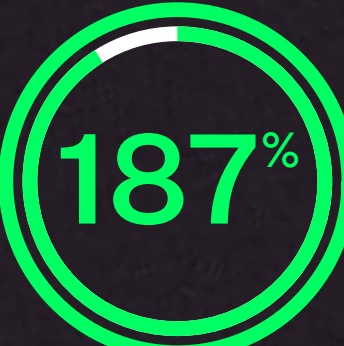
MVPs stay with their club 39% longer than other members



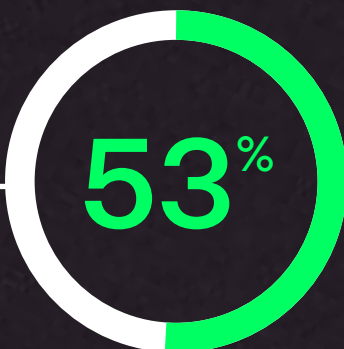
MVPs are 88% more likely to still be active after 12 months than other members



93% of MVPs say doing their favorite club activities keeps them loyal to their club



Clubs without MVP activities see 187% higher attrition than those that offer them



53% of MVPs will pay more for a gym offering their favorite activities



# CLUB ECONOMICS





# CLUB ECONOMICS

Few businesses can match clubs for their ability to change lives. The energy, the passion, and the connections forged within the four walls of a club combine to deliver an experience like no other.

Given the dynamism of the product, the economics that underpin club businesses are surprisingly straightforward.

Through the dominance of the membership model, the overheads of a club and its revenue potential are largely fixed, so maximizing profitability comes down to five options:

- 1 Cut costs
- 2 Increase prices
- 3 Create new products and services
- 4 Acquire more members
- 5 Keep members longer by boosting retention

It can be anywhere from 5-25 times more expensive to win a new member than to keep an existing one, so focusing on retention offers a far more cost-effective route to growing revenue.

Mapping your facility and identifying the biggest opportunities for growth helps determine your path to success. Each presents its own set of challenges.



# 5 PROFIT PLAYS WITH A CATCH



## CUT COSTS

Most clubs are already pretty lean these days and making further cuts can weaken your foundations, undermining potential for sustainable growth.



## INCREASE PRICES

It's possible to charge more for memberships, but tough to do without providing more value and may cost you some members.



## CREATE NEW PRODUCTS + SERVICES

Feasible, but can be resource heavy and remains challenging at a time when members are more price sensitive.



## ACQUIRE MORE MEMBERS

Requires more sales activity spend and can end up losing you money if the cost of acquiring these members (COAC) exceeds their lifetime value (LTV).



## BOOST RETENTION + REFERRALS

Not an instant fix, but the most achievable for club managers and brings additional benefits by boosting new member referrals, plus LTV, with loyal members more likely to pay a higher premium.



# UNDERSTANDING CONTRIBUTION

## HOW TO MAXIMIZE THE VALUE OF YOUR CLUB’S FLOOR SPACE

Your club’s floor space is not only limited – it’s also one of your most significant operating costs. That makes it critical to configure your space in a way that maximizes both membership capacity and revenue potential.

But maximizing capacity is only part of the equation. To fully capture that revenue potential, you must also maximize the utility (how much the space is used) and the flow rate (how often the space turns over per hour). Combined, these factors make up your club’s contribution, measured as contribution per square meter.

To maximize efficiency and member experience, industry benchmarks suggest a target of 2 members per square meter (10.7ft²).

Research by experienced club operator and fitness economist Gerry Salmon highlights

the significant variance in capacity across different gym zones. For example, CrossFit style spaces where people are using Olympic Barbells typically require 10 m² (107ft²) per person, while cycle studios need only 2 m² (22ft²) per user.

Each space/activity also comes with different utility rates, flow dynamics, and capital/operating costs. And while it’s important to offer an array of training options to stay on-trend and appeal to a broad range of customers (64% of Gen Z have a strong preference for choosing different workouts and discovering new ones), how clubs allocate space has a significant impact on performance and the number of members they can accommodate. With real estate at a premium, prioritizing high-contribution zones enables clubs to optimize floorspace and maximize profitability.

### GENERALIZED SPACE ALLOCATION PER USER

10M² / 107FT²	CROSSFIT
9M² / 97FT²	FUNCTIONAL
7M² / 75FT²	WEIGHTS
4M² / 43FT²	GROUP TRAINING
4M² / 43FT²	CARDIO
2M² / 22FT²	CYCLE STUDIO



# MVPs

**As well as considering contribution to maximize capacity, focusing on filling your club with your Most Valuable Participants (MVPs) holds the key to realising your growth potential.**

Rather than representing a certain personality type, MVPs are defined by their behaviors, meaning anyone can become one with the right support and engagement. MVPs love your club more than any other type of customer, so they stay with your club for longer (solving retention challenges), refer more friends (acquisition), and will spend more (revenue uplift).

And by targeting MVPs through your acquisition efforts, you can be confident they'll join and stay for the long haul, as they're most interested in the areas of your club where you have the biggest capacity to serve them.





# KEY FINDINGS





# KEY FINDINGS

We’ve examined the theory. But how does it play out in practice?

We partnered with industry data experts 4GLOBAL and ROR Partners to conduct the largest-ever analysis of member behaviours, based on 2.6 million member journeys across 1,312 leading clubs in the US and Europe from January 2024 onwards.

Based on the member data available from clubs, we compared the impact of various activities on key club metrics. Group training was shown to outperform gym floor activities on most counts, but the effect was amplified significantly when members did Les Mills workouts – making these members the clear MVPs.

DEFINITIONS

Gym floor member

Gym member who does not participate in group training workouts

Group training member

Member who participates in non-Les Mills group training workouts

Les Mills member

Member who participates in Les Mills workouts





# KEY STATS

65%

Members who do Les Mills workouts visit their club 65% more than gym-only members

59%

Members who do Les Mills workouts visit their club 59% more than members who do other group training formats

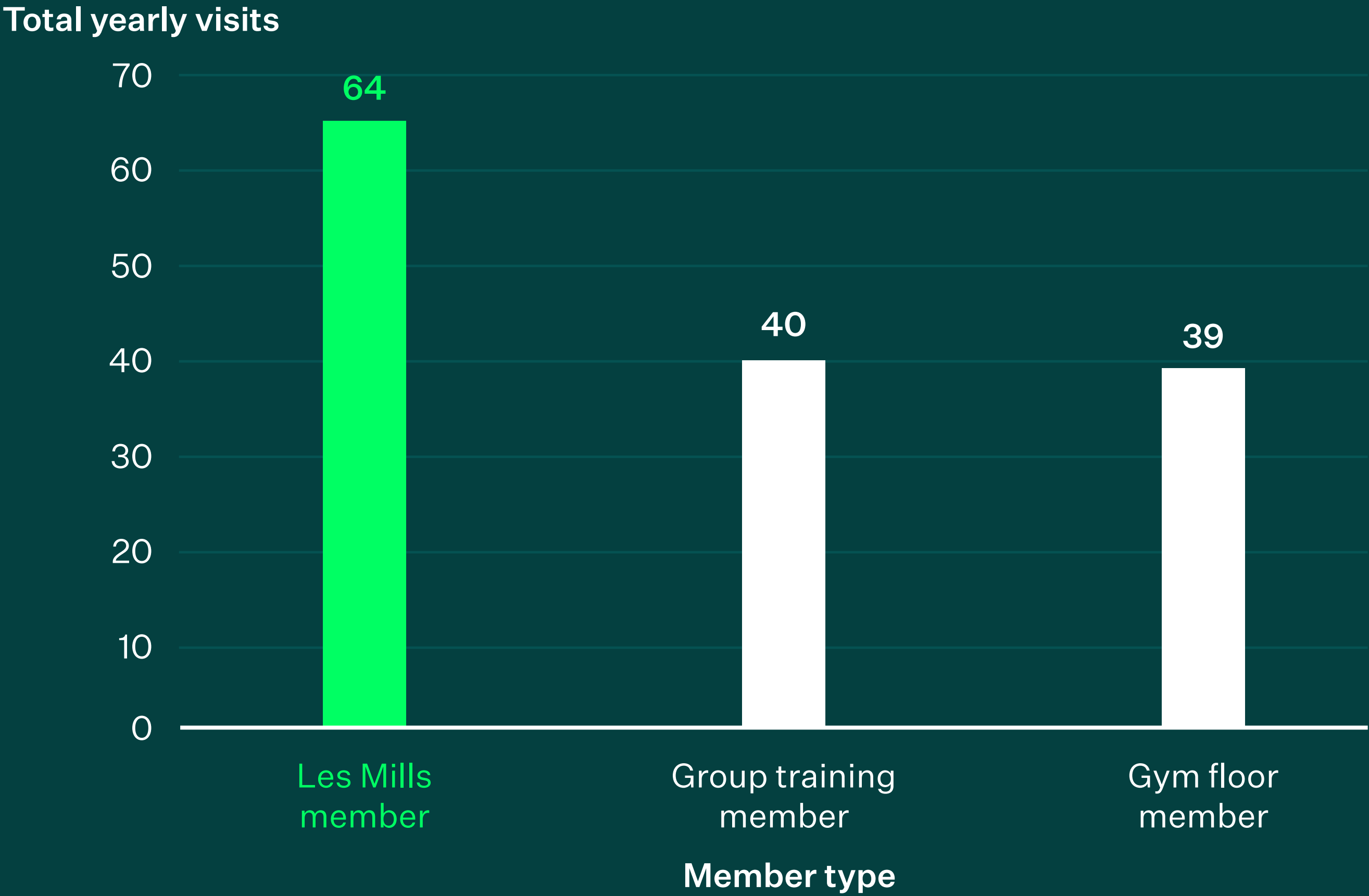
Source: 4GLOBAL DataHub Analysis



# IMPACT OF LES MILLS: YEARLY ATTENDANCE

Introducing members to the group training studio is a game-changer, and the place where the journey to creating more MVPs begins. It's where your MVPs form consistent habits, build connections, and develop the loyalty that keeps them coming back.

Les Mills participants are a powerful driver of long-term member retention for clubs. They attend 65% more than gym-only members and 59% more than members who take part in other group training formats.



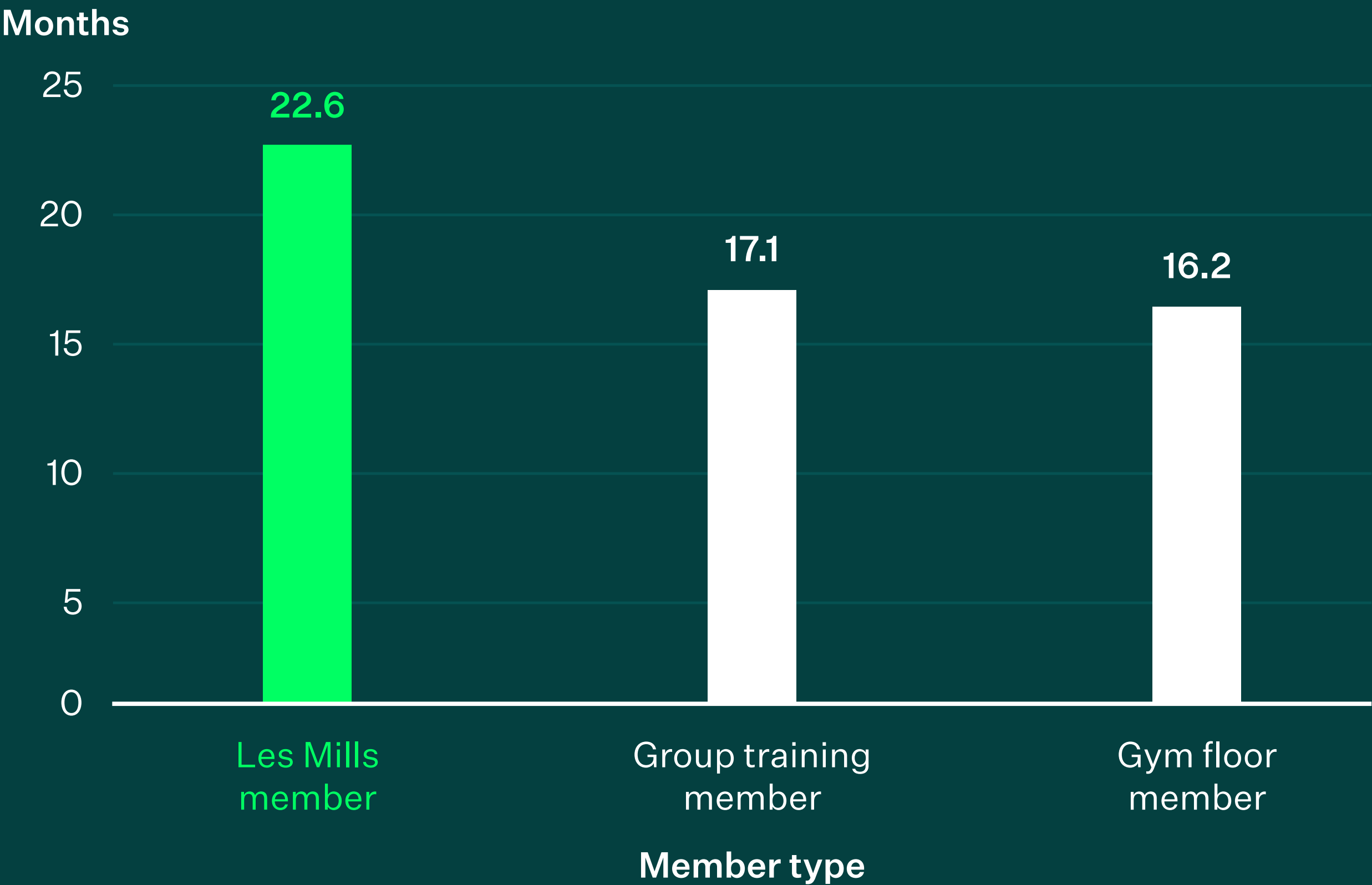
Source: 4GLOBAL DataHub Analysis



# IMPACT OF LES MILLS ON AVERAGE LENGTH OF STAY

Members who take part in Les Mills workouts stay with their club 39% longer than gym-only members, and 32% longer than other group training members.

MVPs provide more revenue over time, delivering greater return on your marketing investment and making a stronger impact on your bottom line.



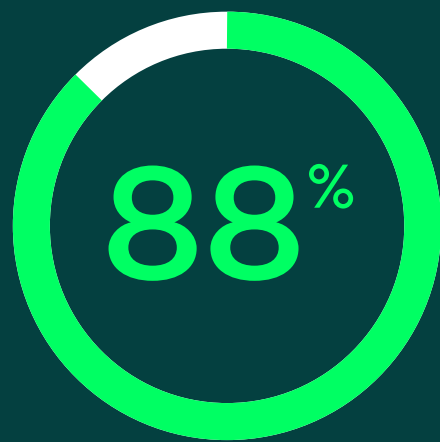
Source: 4GLOBAL DataHub Analysis



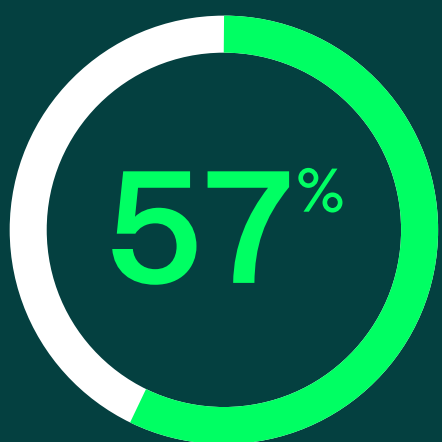
# IMPACT OF LES MILLS ON CLASS PARTICIPATION AND GYM ATTENDANCE

Members who participate in Les Mills workouts offer unrivaled value to operators, with classes attracting higher attendance than other group training offerings.

Consistent participation in group training leads to higher overall club visits among your MVPs. The halo effect of Les Mills group training not only boosts member attendance, but also significantly improves the likelihood of them staying beyond 12 months.



Les Mills members are 88% more likely to still be active after 12 months than gym floor members (49.2% vs 26.2%)



Les Mills members visit their club 57% more each month than gym floor members (11.4 vs 7.3 visits)



The average Les Mills class attracts nearly a quarter more participants than other group training formats

Source: 4GLOBAL DataHub Analysis



# IMPACT OF LES MILLS ON MEMBER CANCELLATIONS

**Creating more MVPs for your club does more than just keep your studio occupied, it protects you against churn.**

Members who visit their clubs to engage solely with strength or cardio equipment are a flight risk, representing a 71% higher attrition rate than members who do Les Mills workouts as well. Broadening the scope of your members’ activities enriches their in-club experience, giving them more reasons to keep coming back.

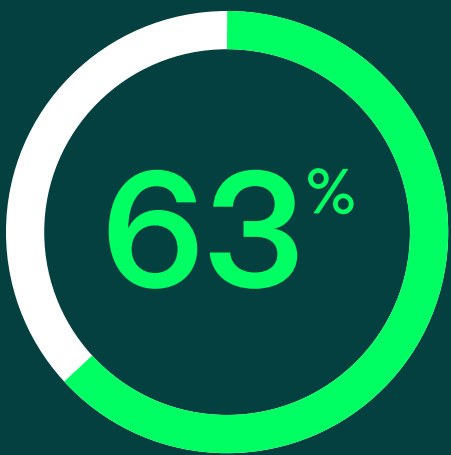
While the group training effect is certainly a factor in members staying longer, savvy operators are taking advantage of workouts designed by category experts. Clubs offering freestyle or other workouts

are experiencing higher churn – members who do other group training formats have a 63% higher attrition rate than members who do Les Mills.

Your MVPs seek variety, motivation and scientifically-designed workouts – all delivered by an expert Instructor who coaches intelligently.



Members who do gym-only workouts have a 71% higher attrition rate than members who do Les Mills workouts.



Members who do other group training formats have a 63% higher attrition rate than members who do Les Mills workouts.

Source: 4GLOBAL DataHub Analysis



# CANCELLATIONS: LES MILLS VS NON LES MILLS CLUBS

Clubs without Les Mills workouts experience a 187% higher attrition rate than those that offer them.

On average, clubs with Les Mills see a 3% monthly cancellation rate, compared to a steep 8.6% monthly rate in clubs that don't offer Les Mills workouts.

Consistent member habits are critical during seasonal drop-off periods. In times like summer — when vacations pull members away, and winter, when holiday celebrations take priority — clubs offering Les Mills see a marked reduction in cancellations compared to those who don't. MVPs are a major asset year-round, but especially during these periods, enabling operators to focus on growth through new member acquisition and maintain a flywheel of momentum with existing members, instead of constantly replacing them.

Cancelled memberships



Source: 4GLOBAL DataHub Analysis

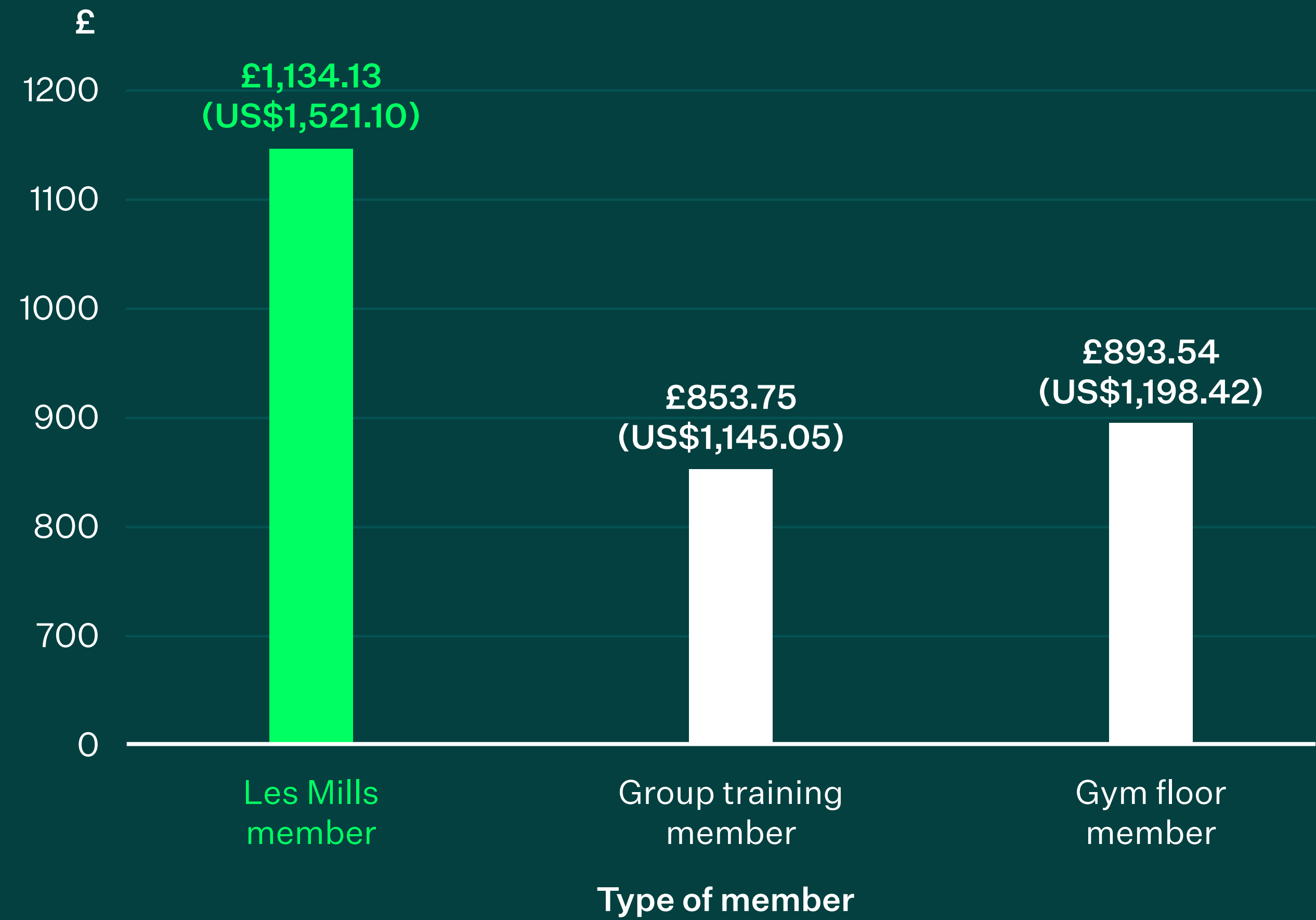


# LIFETIME VALUE

Members who do Les Mills workouts have a 27% higher LTV than gym-only members and a 33% higher LTV than members who do other group training formats.

When you combine the positive effects of increased attendance, class capacities, and improved retention rates, the result is a powerful, cumulative impact on one critical metric for your club: your bottom line. Each of these factors doesn't just add value individually — they converge to drive sustained growth and profitability.

The loyalty and engagement demonstrated by Les Mills members make them your Most Valuable Participants. Their significantly higher LTV underscores the power of Les Mills workouts to attract and retain committed members who invest more deeply in your club over time.



Source: 4GLOBAL DataHub Analysis



“ As an independent sector-leading data partner, 4GLOBAL is proud to work with Les Mills to bring a clear, evidence-based view of how their programming is influencing the global fitness landscape. By analysing individual-level data from operators across both the 4GLOBAL and Les Mills networks, we’re uncovering how Les Mills drives meaningful outcomes in member retention, engagement, and lifetime value. In a post-COVID world of changing behaviours, this project gives the sector the independent insight it needs to understand what’s working.”



**NEIL TANDY**

SALES MANAGER, 4GLOBAL



# QUALITATIVE RESEARCH

**To dig deeper into the MVP mindset, we asked 2,400 members of a major US gym chain about how group training classes affect their decisions to join a gym, what they're looking for from classes, and the impact it has on their length of stay.**

We found that when members discover the group training experience, it stays with them and serves as their primary driver for choosing a gym. While 56% of gym-only members say group training availability is important when choosing a gym, that number jumps to 96% among those who participate in Les Mills workouts.

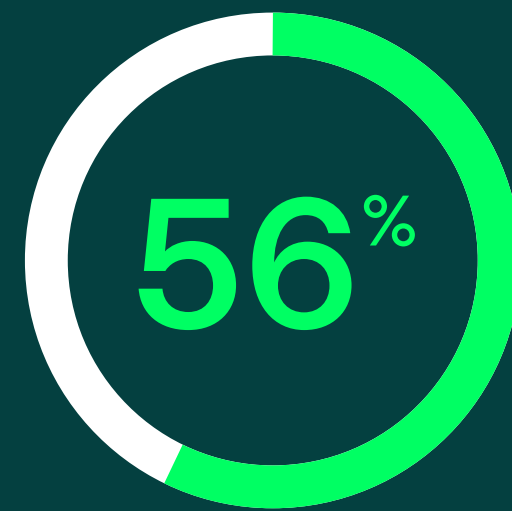
This stark contrast shows that for many, group training may not be a

deciding factor at first — but once experienced, it becomes a key driver of loyalty and preference. For the uninitiated, it's just another class. But for those who try it, group training quickly transforms into a must-have feature that shapes their gym choice and long-term commitment, with 93% stating that it positively impacts their decision to stay with a gym.

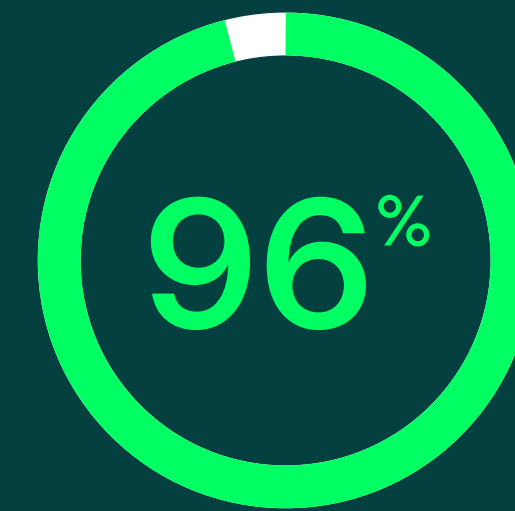
Group training participants are not only more engaged, they're also powerful advocates: 89% say group training makes them more likely to refer friends. This social dynamic strengthens retention by turning workouts into shared experiences, building community, and making your club stickier through connection, as well as results.



# KEY STATS



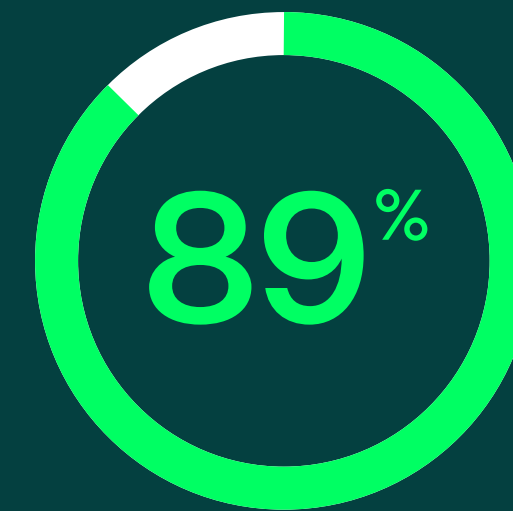
of all members said group training classes were an important part of the decision to join their current gym



of Les Mills participants said group training is an important part of choosing their gym



of Les Mills participants said their group training classes made them more likely to continue with their membership



of Les Mills participants said taking part in group training made them more likely to refer friends

Source: ROR partners



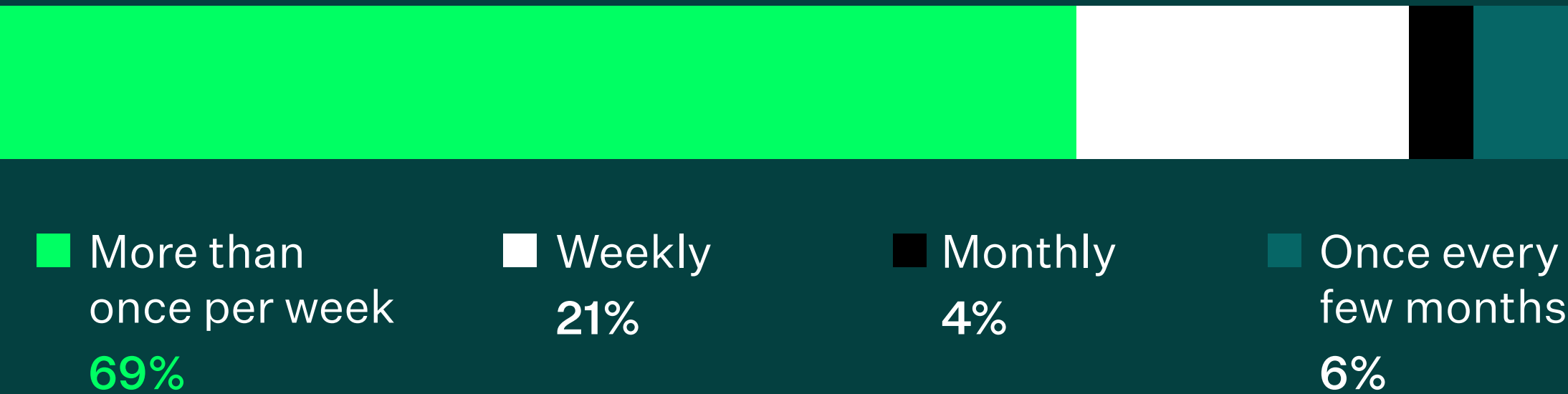
# GROUP TRAINING ATTENDANCE AND MEMBERSHIP CANCELLATION

Les Mills group training is driving bulletproof retention rates for clubs offering it, and once members are in the studio, they become more loyal.

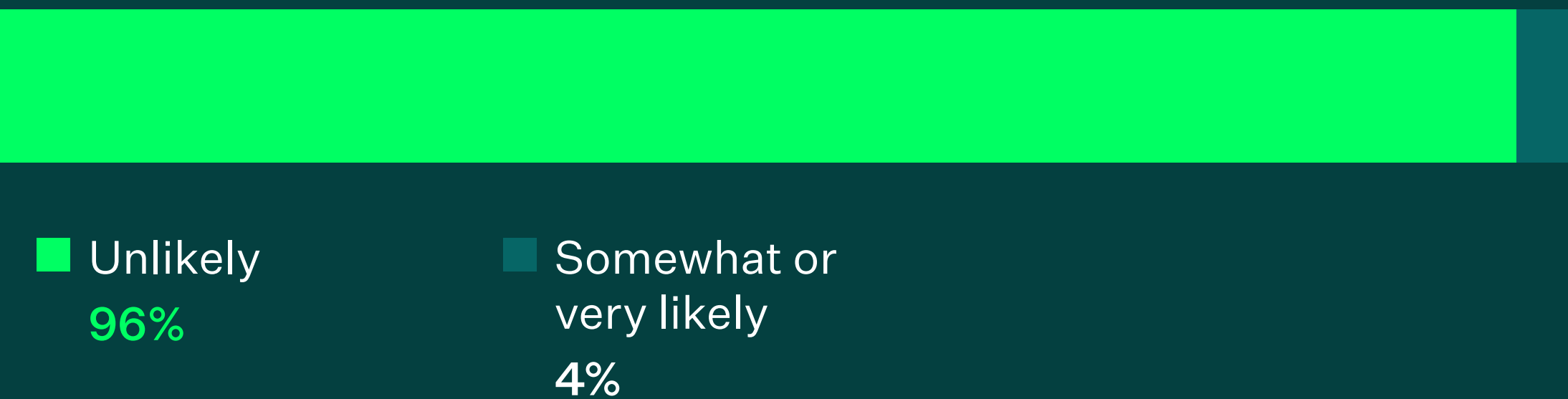
Thanks to the sticky, retention-boosting environment the studio creates, group training participants are much less likely to have their heads turned by other offerings. Instructors play a vital role in this, with 84% of people citing the quality of Instructor as their most important factor when choosing a class.

The sooner you introduce members to the thrill of group training, the more likely they are to become your MVPs, attending frequently and returning for the irresistible connections that come with community-building fitness experiences.

How often do you typically attend group classes at a location outside your home?



How likely are you to cancel your gym membership in the next 90 days?



Source: ROR partners

# IMPACT OF GROUP TRAINING ON MEMBERSHIP FEES

The willingness of your MVPs to invest more reflects a strong preference for quality, representing a higher lifetime value for clubs.

It's a clear opportunity to differentiate your offerings from rivals, carefully adjust pricing, and invest in group training programs that drive both revenue and member satisfaction.



**53% OF  
LES MILLS  
PARTICIPANTS**

are willing to pay more for a gym membership that offers those classes

Source: ROR partners



“This research confirms what club operators observe daily: members who join group classes are typically the most valuable customers. They stay longer, pay more, and are more likely to refer friends. For prospective members, high-quality group programming is often a key factor in choosing a gym, underscoring the importance of robust offerings such as Les Mills.”



**TOM LANAHAN**

CHIEF STRATEGY OFFICER,  
ROR PARTNERS

# MVP ACTION PLAN

HOW TO FILL YOUR CLUB WITH MVPs





# MAXIMIZE YOUR MVPs

The research shows members who do Les Mills classes attend their club more often, stay longer, are more likely to refer friends, and have a higher LTV than any other type of member category.

They're your MVPs (Most Valuable Participants) – and they have the ability to transform a business. Here's how to create more of them and maximize your club's potential.



- 1. UNLEASH LATENT CAPACITY**
- 2. INSTRUCTORS WIN MVPs**
- 3. REDUCE FLIGHT RISK WITH MVP ONBOARDING**
- 4. OFFER WORKOUTS THEY CAN'T LIVE WITHOUT**
- 5. CREATE MORE PATHS TO THE STUDIO**
- 6. DESIGN YOUR STUDIO EXPERIENCE**
- 7. GROW YOUR MVPs WITH CHOICE**
- 8. COVER ALL BASES WITH YOUR MARKETING**





1

# UNLEASH LATENT CAPACITY

Driving members towards underutilized areas of the club creates the foundations for growth

**Thanks to the strong momentum behind strength training, most gym floors are already busy, so focusing your marketing activities on acquiring more people seeking standard strength training will likely add to the queues on the gym floor and leave these members dissatisfied.**

Conversely, focusing efforts on driving new and existing members towards the areas of the club with underutilized capacity creates the foundations to successfully attract new members and retain existing ones, e.g. direct new members looking for strength training into strength classes.

Your club's marketing strategy is central to ensuring you reach more of your MVPs. As the data shows, members who do Les Mills group training provide the best return on your marketing spend thanks to their higher lifetime value.

By funneling members into areas of the club where more people can be serviced simultaneously, clubs can reduce bottlenecks and introduce members to the most social elements of their club, increasing their likelihood of becoming an MVP. In doing so, operators can significantly increase the number of members they can support, unlocking capacity to fuel further member growth.

## UNLEASH LATENT CAPACITY

“The biggest thing for operators of all sizes in managing footfall is to ensure they’re signposting members to other areas of the club where they’re able to service more people simultaneously – such as the group training studio. You’re better off targeting prospects who will predominantly use the areas of the club where you still have capacity to fill. You’re in a better position to meet the needs of these prospects, so they’ll likely stay longer and yield a longer lifetime value, representing a better RoI for your marketing dollars.”



**PAUL BEDFORD**

RETENTION GURU





2

## INSTRUCTORS WIN MVPs

Core skills like coaching and building connections translate powerfully in a group setting

**Instructors are the beating heart of successful clubs. Each great Instructor has the ability to attract and retain hundreds of members to your club, while a team of them can bring in thousands. They are the frontline of engagement and retention in your club – the most important touchpoint for bringing your group training strategy to life.**

As the magnets that draw your members back, attracting and retaining star performers should be a central pillar of any club's strategy. Keeping Instructors motivated requires continuous professional development and incentivization.

Just as members require choice, so too do Instructors. Your leading lights should be offered the opportunity for further training, qualifications, and mentoring, to help sharpen their skills and ensure they feel supported.

Casting your recruitment net wide could unearth options that have previously been overlooked, like fitness fanatics, sports stars, actors and dancers, as well as some of your PTs and studio regulars. Many are already in your club and simply require a shoulder tap, while others may be further afield and require some scouting. Gen Z Instructors are especially valuable for their ability to attract their peers and fill your club with the next generation of members.

## INSTRUCTORS WIN MVPs

“We hosted an intensive training session where PTs had the opportunity to learn from experienced Les Mills Instructors. Before our PTs understood the new methods of coaching Les Mills is opening up, they were uncertain how it could be relevant for them. Being able to hear about the science behind the training, and the extensive testing the workouts go through before even launching really shifted the mindset. Around 90% of the Instructors we certified in our first round across 13 clubs were personal trainers.”



**ERIKA ZALETA**

VICE PRESIDENT OF CLUBS,  
THE EDGE FITNESS CLUBS





3

## REDUCE FLIGHT RISK WITH MVP ONBOARDING

Diving into what motivated your new members to show up is key to their success

**The best way to create more MVPs is to set members up for success from the start of their membership by providing effective onboarding that familiarizes them with every corner of your club.**

The latest Industry figures (REX / Retention Guru 2025) suggest half of new joiners leave their facility within the first 15 months, and 52% of all cancellations are silent (Xplor Gym research, 2023) – meaning members pulled an upcoming payment without prior notice, or quit without sharing a reason. Creating MVPs who are less likely to leave you requires clear explanation of how their goals can be met in your club, and crucially, your studio.

Diving into what motivated your new members to show up is key to their success – and your chances of unearthing

your next MVP. This means understanding why they've chosen now to join, their goals, and any potential barriers they face. Gaining a deeper understanding of their existing routines and the time they have available to exercise helps hatch a plan they can adhere to. For example, people seeking to gain strength should be given guidance on how the classes on your timetable can support this.

Empower them to start small and build up their confidence, both on the gym floor and in the studio. Nail this at the start of the member journey and you're well on your way to creating more MVPs.

## REDUCE FLIGHT RISK WITH MVP ONBOARDING

“We’re targeting ‘new’ members, especially those who are on their first fitness journey. Making classes accessible to that audience is key. We used Les Mills SMART START principles to support with that, reminding members at the top of every class – if after 20 minutes you feel you’ve had enough, it’s OK to leave.”



**LUKE HEAPES**

MEMBER EXPERIENCE MANAGER,  
WEST WOOD CLUBS





4

# OFFER WORKOUTS THEY CAN'T LIVE WITHOUT

The most successful facilities offer a combination of the top 8 genres for group training

**Offering irresistible group training workouts is key to growing your MVPs, but to ensure they stay, offer a breadth of intensity and variety. Modern exercisers have an unprecedented amount of choice at their fingertips, so delivering a quality experience that is engaging and irresistible will ensure you keep their attention for longer – helping drive retention.**

A broad timetable that supports varying routines ensures there are plenty of options to increase your chances of growing MVPs. The most successful facilities offer a combination of the top 8 genres for group training: Strength and Weights, Cardio, Cycle, Mind/Body, Martial Arts, Pilates/Core/Sculpt, Dance, and HIIT. But of course, each operator knows their MVPs best, so the trick is to take this guidance and then pay close attention to class attendance stats and refine the timetable to suit your club's specific member profile.

Bolstering your recruitment and retention strategy with new, trend-based programming injects a dash of excitement and reduces the risk of MVPs becoming bored with their core group training activities. Embedding a cycle of new and engaging activities in your studio is integral to keeping members coming back – including audiences you might not have previously considered being open to group training.

Stats from Les Mills New Zealand (LMNZ) gyms show men make up nearly a third (29%) of all group training bookings in the past year, with attendance spikes across strength and cycle in particular. In addition, men make up the majority of participants at LMNZ's CEREMONY™ functional circuit training classes. Helping members – especially men – realise their training goals can be met in the studio is key to helping more of them become MVPs.

## OFFER WORKOUTS THEY CAN'T LIVE WITHOUT

“Since introducing LES MILLS CEREMONY, classes are averaging 71% capacity, well above the regional group training average of 55%. At Balaclava, which opened just last week, attendance is already at 53% despite the proximity to the holiday season. Members love the community vibe, the challenge it offers, and the unique coaching style that creates a more immersive and inclusive experience.”



**FITNESS &  
LIFESTYLE  
GROUP**

### NICOLE GRAINGER

NATIONAL GROUP FITNESS MANAGER,  
FITNESS & LIFESTYLE GROUP –  
AUSTRALASIA'S LARGEST CLUB CHAIN





5

## CREATE MORE PATHS TO THE STUDIO

Hosting group training taster sessions showcases the integrity of the workouts on offer

**Growing your MVPs requires a well-defined, meaningful journey that deepens their connection to your club.**

By paying careful attention to when members are checking in, you can refine your group training timetable to capture the attention of those who aren't getting the most out of their membership. Getting group training into their eyeline and psyche demonstrates other ways their needs can be met and helps turbocharge the process of creating more MVPs. That could mean taking classes out onto the gym floor at key moments, to remove the mystery of whether they're a 'fit', providing visibility for cynics and the curious alike.

Additionally, hosting group training taster sessions showcases the integrity of the workouts on offer, the fun of working out socially, and the community this creates.

This is especially important for making MVPs out of those who think group training can't help with their goals or is too intense for them. Unsure what your studio-shy members are looking for? Running internal club surveys asking them what workouts they're interested in allows you to plan against interest and increase your chances of keeping members coming back to the studio once they take the plunge.

Within months of launching their first Les Mills program, YMCA Greendale saw a 1.33% increase in member retention rates, a 9% increase in new member joins and a 2% decrease in cancellations. This equates to an additional US\$26,719 in monthly membership revenue, with the potential to contribute US\$320,000 annually.

## CREATE MORE PATHS TO THE STUDIO

“Historically, our classes were predominantly attended by a static demographic that didn’t fully represent the community we serve. When we started the partnership with Les Mills we had 10% of our members taking part in group exercise, but in less than a year that’s risen to 14% and we’re gunning for 20%. We wanted to attract a broader demographic – including younger participants, men, and individuals from various ethnic backgrounds. It’s been a game-changer for our bottom line and proves the Rol of investing in high-quality group fitness programs.”



**CHRISTINA PULEO**

SENIOR EXECUTIVE DIRECTOR,  
YMCA GREENDALE





6

# DESIGN YOUR STUDIO EXPERIENCE

Creating Instagram-worthy spaces encourages members to take post-workout selfies, turning them into brand ambassadors

**Providing compelling fitness experiences that give great results is essential to keeping members coming back for more. People regularly rate appearance and atmosphere as important factors determining their decision to join a club, underlining the importance of choreographing the entire member experience – from entry to exit.**

Consider elements like lighting, acoustics, and ambiance. Small changes make the difference, such as leaving the doors to your studio open when it's not in use. Demystify the studio and make it an access-all-areas space. If members can't visualize themselves in it, they're unlikely to become your next MVP.

And if you've got a studio that members love spending time in, modern social media habits dictate they'll likely want to share it with their friends. Creating Instagram-worthy spaces encourages members to take post-workout selfies, turning them into brand ambassadors. Adding extra flourishes like bold branding and including your club's social media handles in your space increases your reach in a crowded market. And creating an inspiring space to work out in builds a buzz that ripples through your community.

## DESIGN YOUR STUDIO EXPERIENCE

“We worked closely with the Les Mills team to design the right training spaces and really maximize the potential of our studios. For our Balaclava location, we replaced traditional group fitness studios with “athletic studios” featuring black walls, industrial-style lighting, and open training zones.

It’s strengthened our appeal to younger members and men. At Richmond, 65% of CEREMONY attendees are men, and the average participant age is 34, which is significantly younger than the rest of our classes.



### NICOLE GRAINGER

NATIONAL GROUP FITNESS MANAGER,  
FITNESS & LIFESTYLE GROUP –  
AUSTRALASIA’S LARGEST CLUB CHAIN





7

## GROW YOUR MVPs WITH CHOICE

Scheduling timetables  
horizontally – instead of vertically  
– is an often overlooked technique  
for boosting class attendance

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**Leveraging key club metrics such as attendance and class occupancy is essential to increasing your MVPs.**

By monitoring class occupancy, it's easier to adjust schedules to better meet demand and optimize Instructor deployment. When it's time to add a new class to the schedule, the stats can guide whether to replace an underperforming class or try a new slot. Taking a data-driven approach helps improve MVP satisfaction and retention by ensuring the studio offerings align with client interests and fitness goals.

Scheduling timetables horizontally – instead of vertically – is an often overlooked technique for boosting class attendance.

Horizontal timetabling – as demonstrated on the next page – adds variety to your time slots and, crucially, broadens the scope of who they attract. Scheduling strength workouts at the same time every evening risks excluding large swathes of members who can't make that slot, or others who can only make that slot and would attend more classes if they had varied options. To overcome this challenge, try offering each core program at least two or three times a week within a one to two-hour timeframe.

GROW YOUR MVPs WITH CHOICE — HORIZONTAL TIMETABLING

TIME	MONDAY	TUESDAY	WEDNESDAY	THURSDAY	FRIDAY
	—————>	—————>	—————>	—————>	—————>
6:30AM	<i>LES MILLS</i> <b>BODYPUMP</b>	<i>LES MILLS</i> <b>RPM</b>	<i>LES MILLS</i> <b>BODYPUMP</b>	<i>LES MILLS</i> <b>RPM</b>	<i>LES MILLS</i> <b>BODYPUMP</b>
7:30AM	<i>LES MILLS</i> <b>RPM</b>	<i>LES MILLS</i> <b>BODYPUMP</b>	<i>LES MILLS</i> <b>RPM</b>	<i>LES MILLS</i> <b>BODYPUMP</b>	<i>LES MILLS</i> <b>RPM</b>
	—————>	—————>	—————>	—————>	—————>
9:30AM	Strength <small>LES MILLS</small> Development	<i>LES MILLS</i> <b>BODYBALANCE</b>	Strength <small>LES MILLS</small> Development	<i>LES MILLS</i> <b>BODYBALANCE</b>	<i>LES MILLS</i> <b>RPM</b>
10:30AM	<i>LES MILLS</i> Shapes		<i>LES MILLS</i> Shapes		<i>LES MILLS</i> Shapes
	—————>	—————>	—————>	—————>	—————>
12:10PM	<i>LES MILLS</i> <b>BODYCOMBAT</b>	<i>LES MILLS</i> <b>RPM</b>	<i>LES MILLS</i> <b>BODYPUMP</b>	<i>LES MILLS</i> <b>RPM</b>	<i>LES MILLS</i> <b>BODYCOMBAT</b>
1:10PM	<i>LES MILLS</i> <b>BODYPUMP</b>	Strength <small>LES MILLS</small> Development	<i>LES MILLS</i> <b>BODYCOMBAT</b>	Strength <small>LES MILLS</small> Development	<i>LES MILLS</i> <b>BODYPUMP</b>
	—————>	—————>	—————>	—————>	—————>
5:10PM	<small>LES MILLS</small> <b>CEREMONY</b>	<i>LES MILLS</i> <b>BODYPUMP</b>	Strength <small>LES MILLS</small> Development	<i>LES MILLS</i> <b>BODYPUMP</b>	<i>LES MILLS</i> <b>RPM</b>
6:10PM	<i>LES MILLS</i> <b>BODYPUMP</b>	<small>LES MILLS</small> <b>CEREMONY</b>	<i>LES MILLS</i> <b>BODYPUMP</b>	<i>LES MILLS</i> <b>BODYCOMBAT</b>	<small>LES MILLS</small> <b>PILATES</b>
7:10PM	<i>LES MILLS</i> <b>BODYBALANCE</b>	<small>LES MILLS</small> <b>PILATES</b>	<i>LES MILLS</i> <b>RPM</b>	<i>LES MILLS</i> <b>BODYBALANCE</b>	



## GROW YOUR MVPs WITH CHOICE

“I take a helicopter view of the week, and design our timetable horizontally from there. So if you come in at 6pm, you’re getting something different every day. We benchmark our visits year on year. At the beginning of the year, we look at what we can do to drive more footfall. In the past 12 months, one of our sites has increased group fitness attendance by 50%, while the others have both grown by 30%. We set out to achieve those targets by ensuring we’re offering a broad mix of programming, so our members have choice.”

G64

**SOPHIE BROWN**

STUDIO COORDINATOR,  
GYM 64 (SCOTLAND)



8

## COVER ALL BASES WITH YOUR MARKETING

Assess your main member touchpoints and choose marketing assets that spark curiosity

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**Every operator knows that marketing is a central pillar of growing a facility, but creating more MVPs requires a carefully calibrated approach.**

Assess your main member touchpoints and choose marketing assets that spark curiosity and gently remind your audience about the group training offering at your club. Serving multi-generational members means paying attention to what resonates with them and using different channels to capture their attention. This includes leveraging the reach and charisma of your Instructor team to connect with new and existing audiences on social media,

as well as creating eye-catching spaces throughout your club to encourage User Generated Content (UGC).

Nailing these opportunities can effectively turn MVPs into free brand ambassadors and boost awareness, while offering rewards and incentives for member referrals can yield direct sales.

Hosting regular events is another sure-fire way to bring your club's experience to life with a bang, by introducing future MVPs to the studio from the start.



## COVER ALL BASES WITH YOUR MARKETING

“We want to maintain our current retention level of 80%, so we’ve decided to focus on our studios because we can facilitate a lot more people in classes. Our studios are a central pillar of our growth strategy. The investment is small in comparison to the returns we’ll see if we can keep our retention rate high, so we see group training as offering a great return on investment.”

**lifefit** | group

**MARTIN SEIBOLD**

CEO LIFEFIT GROUP (GERMANY)

# METHODOLOGIES





# DEFINITIONS

## LES MILLS WORKOUTS

Science-backed group training workouts set to music and delivered by a qualified Les Mills Instructor.

## GYM FLOOR MEMBER

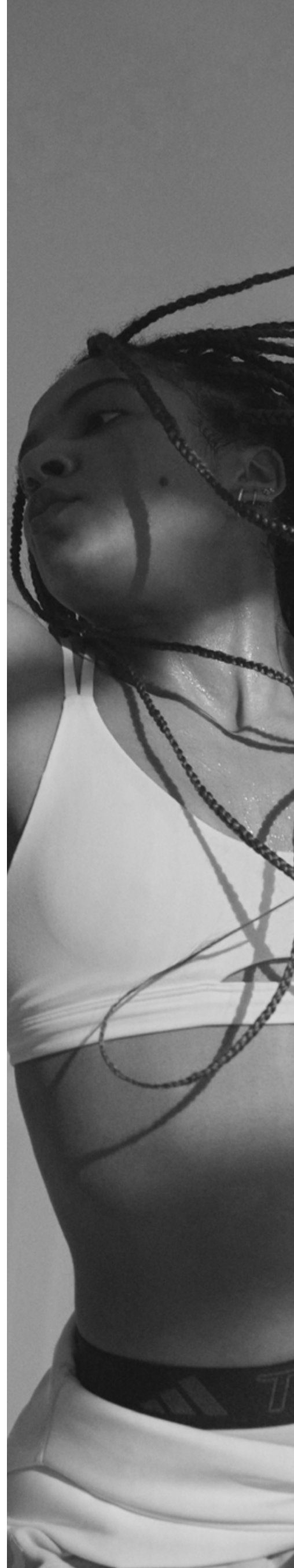
Gym member who does not participate in group training workouts

## GROUP TRAINING MEMBER

Member who participates in non-Les Mills group training workouts

## LES MILLS MEMBER

Member who participates in Les Mills workouts





# METHODOLOGIES

## 4GLOBAL

Analysis of the European market was undertaken by data consultants 4GLOBAL.

It covers a 12-month period from January 2024 to December 2024, providing a comprehensive overview of member behavior across a wide sample of fitness facilities and classes.

- **Timeframe:** January 1 – December 31, 2024
- **Total Club Sites:** 961
- **Total Individual Participants Analysed:** 2,570,544
- **Total Number of Visits/Swipes:** 126,127,326
- **Total Classes Included in the Analysis:** 2,710,303

Data was aggregated from a broad network of fitness clubs across Europe – predominantly the UK, but also Ireland and Portugal – and

captures both individual member check-ins and class participation. This large dataset provides statistically robust insights into attendance patterns, group training engagement, and retention-related behaviors across a wide member base.

## ROR PARTNERS

Analysis of the US market was undertaken by North American data consultants, ROR Partners. It draws on both quantitative member data and qualitative survey responses to provide a comprehensive picture of gym member behavior and sentiment.

## MEMBER DATA ANALYSIS

An in-depth analysis was conducted on the activity of 158,493 individual gym members across 351 club locations, covering the period from January 2024 through May 2025. This analysis focused on behavioral patterns,

including attendance, program participation, and engagement trends across a diverse range of fitness facilities.

## MEMBER SURVEY

To complement the behavioral data, a separate survey was conducted between May and June 2025, capturing insights from 2,405 active gym members. The survey explored members’ attitudes, motivations, and preferences related to group training, providing additional context to the patterns observed in the data analysis.

Together, these two sources offer a well-rounded understanding of what drives member engagement, loyalty, and long-term retention in today’s fast-changing fitness landscape.

Further details regarding methodology are available upon request.



# THANK YOU FOR READING MVPs: THE NEW POWER PLAYERS IN CLUB GROWTH.

Looking for support with your club's most pressing issues? Visit the Les Mills Insight Hub, home to trusted, insights-driven resources that help you grow your club.





**LesMILLS**

