



BRITISHROWING

Indoor Rowing 'Membership'

An alternative approach

23 November 2018

TEAMWORK | OPEN TO ALL | COMMITMENT

OUR THREE DISCIPLINES



Sliding Seat Rowing



Fixed Seat Rowing



Indoor Rowing

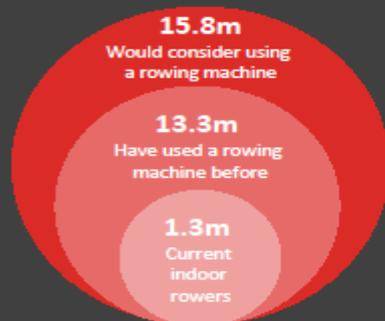
OUR RESEARCH

Segmentation of the Health & Fitness Market – Key Findings and Actions



THE CURRENT LANDSCAPE

Size of the potential indoor rowing market



Sizing based on qualification of the sample in relation to ONS mid-2014 population estimates

4 in 5

have access to a rowing machine



1 in 4

gym goers with access to a rowing machine are using the equipment

FUTURE APPROACH

Six segments were identified in this research, distinguished by their level of motivation to exercise, how they are motivated (by themselves or others) and competitiveness

Fitness Fanatics	Routine Driven	Socially Motivated	Personal Goal Seekers	Competitive Rivals	Passive Introverts
19% (3m)	12% (2m)	15% (2.4m)	15% (2.3m)	29% (4.6m)	10% (1.6m)

British Rowing's priority health and fitness market segments for future targeting

The research highlighted 5 areas for investment by British Rowing and its industry partners

Awareness	Education	New offers	Technology	Community
Promoting the benefits of indoor rowing and targeting a broader audience with appropriate language/images	Training for fitness professionals and gym goers on good technique and achieving a great workout	Indoor rowing classes that are effective, fun and social, as well as events and other products to add fun and variety	Engaging challenge and tracker apps, leagues, equipment and more	Tailored content, resources, newsletters, events, discounts and more to grow affinity and boost participation

Further information on Go Row Indoor, British Rowing's new indoor rowing programme, can be found at www.britishrowing.org/indoor-rowing/

KEY MESSAGES

Overcome barriers that indoor rowing is boring and repetitive

Reinforce benefits, particularly 'total body workout' as a key 'hook'

KEY STATISTICS TO ADDRESS



1 in 2

indoor rowers are self-taught



4 in 5

indoor rowers spend less than 30mins on a machine

1 in 4



indoor rowers consider themselves 'rowers' (grows to 1 in 3 among people using rowing machines for 21+ mins per session)

Source: indoor rowing segmentation research (2017). Sample definition: 16-64s in England, who have exercised in the last 3 months, are a current/former gym/leisure centre member or attend(ed) pay as you go classes and don't reject using an indoor rowing machine

OUR ROLE

Coherence

Bringing industry partners together

Experience

Addressing barriers to participation and growth

Awareness

Providing a collective voice/profile that hasn't previously existed

Success is...

A generation of indoor rowers that feel connected to the sport



GO ROW INDOOR

Whether you're a complete beginner or a rowing pro, **GO ROW INDOOR** has something for you.

#GOROWINDOOR

British Rowing's indoor Rowing Programme.



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OUR OFFERS

Community Club Offer - fitness professional training for rowing coaches

Fitness Professional Training - accredited training for fitness professionals

Classes - studio class, model, You Tube

Tech - improving the indoor rowing experience

Community & Content - in-gym resources

Online Resources – training plans, workout videos, e-newsletter

Events – British Rowing Indoor Championships, Power8 Sprints activation

INDOOR ROWING 'MEMBERSHIP'?

- Committed to improving our offer for indoor rowers
- Generate an income stream to support reinvestment
- Limited demand amongst our target markets (gym goers & home rowers) for traditional membership
- Offer to reflect competitors and consumer demand for high quality, tailored content and experiences
- Fresh, entrepreneurial approach with a focus on new products and offers (eg. daily content, apps etc.)
- Establish credibility and build trust with a new audience
- Staged approach:
STAGE 1 - establish market positioning & build community
STAGE 2 - develop/upsell tailored 'must have' products/offers



PHOTO: SIMON WAY

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