

Norm Cates'

# CLUB INSIDER

CELEBRATING 30+ YEARS OF TRUST

## *Cover Story Classics:* The Schwartz Family



APRIL 2025

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# CLUB INSIDER

CELEBRATING 30+ YEARS OF TRUST

## Cover Story Classics:

### The Schwartz Family - 50 Years of Success at Midtown Athletic Club

By: Norm Cates & Justin Cates

**Publisher's Note:** Our Cover Story Classics series continues this month with the story of the legendary **Schwartz Family** and **Midtown Athletic Club**. This story was written and the interviews conducted in November 2020, during the pandemic, but the history and lessons learned over 50+ years of business are as pertinent as ever. This story was unique in that the father and son of a legendary company were interviewed by the father and son of *Club Insider*. It was a memorable experience that we are happy to re-share today. Sadly, since the original publication of this story, family patriarch, **Alan Schwartz** passed away in 2022 at age 91. **May Alan Schwartz** continue to rest in peace, and may **Midtown** continue to thrive!

...

The year is 1970. A new decade arrives, the space race has been won and *Tennis Corporation of America*, TCA (now *Midtown Athletic Club*) opens its doors. A gallon of gas is 36 cents, and the cost of a new home is just over \$25,000. It was a different time. Fast forward to today, and *Midtown Athletic Club* is now celebrating 50 years of success.

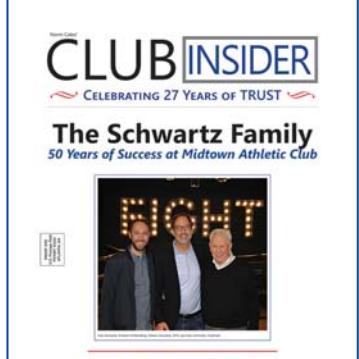
Founded by **Alan Schwartz** and his father, **Kevie Schwartz**, the family business is now four generations deep, with Alan's son, **Steven Schwartz**, as the company's *CEO*, and Steven's son, **Alex Schwartz**, as the company's *Director of Marketing*. The Midtown of today is night and day compared to the TCA of the early

days, but it was not an overnight change. The key tenet of reinvestment into the business has led to a steady evolution of the company over the years.

Now, with the devastation caused by COVID-19, Midtown has continued its evolution to ensure survival and be poised for new success. This has cut the 50-year celebration short, but as Steven Schwartz says, "We are going to celebrate next year when 51 will be the new 50."

Folks, this cover story is one of the longest in the history of *Club Insider*, but we assure you it is worth the read. The advice you will be given, the lessons you will learn and the stories you will be told will better round you out as a professional in the health and fitness club industry. We

(See *The Schwartz Family* Page 10)



CLUB INSIDER  
CELEBRATING 27 YEARS OF TRUST  
**The Schwartz Family**  
50 Years of Success at Midtown Athletic Club  
NOVEMBER 2020  
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November 2020 Edition of Club Insider

### CR Fitness Holdings Opens 75th Location with State-of-the-Art Facility in Colleyville, Texas

COLLEYVILLE, TX - *Crunch Fitness* is bringing its exciting and inclusive fitness experience to Colleyville, Texas, with the opening of its brand-new 3.0 location. This state-of-the-art facility is designed with luxury lighting and a sleek, modern look that makes every workout an energizing experience. From the moment members walk in, *Crunch Colleyville* will redefine what a fitness destination can be, blending cutting-edge equipment with an atmosphere that's as motivating as it is fun.

The doors officially opened for workouts on April 10th at 5:00 AM with a soft opening, giving early members a chance to explore this new, \$5 million gym. The grand opening celebration took place



on April 12th from 10:00 AM to 1:00 PM, featuring a lively party atmosphere, exciting promotions and a look at everything *Crunch* has to offer.

"We're absolutely thrilled to bring the *Crunch* experience to Colleyville,"  
(See *Crunch* Page 8)

### Workout Anytime Names Jerry Pugh as New CEO, Ushering in New Era of Growth and Innovation

ATLANTA, GA - *Workout Anytime*, the premium 24/7 fitness franchise with more than 200 locations and a strong commitment to affordable, accessible fitness, announces **Jerry Pugh** as its new *Owner and Chief Executive Officer*. Pugh, the brand's largest franchisee, brings with him years of firsthand experience operating successful clubs and a deep-rooted connection to the brand that began more than a decade ago.

"I am truly honored to step into this leadership role," said Pugh. "As a longtime franchisee, I've witnessed the incredible impact *Workout Anytime* has on communities and its potential for growth. I'm excited to build on this strong foundation



and work alongside our franchisees to explore new opportunities, elevate member experiences and drive the brand to greater success."

Founded in 1999 by **Steven Strickland** and **John Quattrocchi**, *Workout Anytime* has grown to more than 200 locations nationwide. The brand has built a reputation for empowering franchise owners and making high-quality fitness

(See *Workout Anytime* Page 8)

## Inside the Insider: Edition #376

- Clearing Up Misconceptions About HFA Research on Public Policy - **By:** Anton Severin
- The REX Leadership Academy - **By:** Eddie Tock
- Harnessing Data for the Ultimate Health Club Design - **By:** Bruce Carter
- The Intersection of Fitness, Finance and Behavior - **By:** Nancy Trent
- The Benefits of Benefit Selling - **By:** Jeffrey Pinkerton
- Why Most Gyms Fail at Retention and How to Fix It in 30 Days - **By:** Jim Thomas
- U.S. Health Club and Studio Memberships Increase to Record 77 Million
- REX Roundtable Founder Will Phillips Passes Away
- Bay Club Acquires Harbor Square
- And, of Course, Norm's Notes

# Norm's Notes

■Hello Everybody! This is your Club Insider Founder and Tribal Leader Since 1993 checking in with our 376th monthly edition of this 32+ year running club business publication I refer to as: **A Labor of Love!** I'm very thankful that you've tuned in again for this iteration of **Norm's Notes**, as I proceed on my keyboard with my longtime habit of "Telling-It-Like-It-Is!" I'm really happy that you're reading this edition, and I want to **THANK YOU ALL** for sticking with us every month! As usual, we have a bunch of health and fitness club business news, **so please read on!**

■Is AMERICA a GREAT COUNTRY, or WHAT?!? Hmm... hmm... hmm! And, as usual, let me start these **Norm's Notes** with my normal monthly salutation to you all: **GOD BLESS AMERICA and GOD BLESS YOU, YOUR FAMILY and YOUR BUSINESS!!!**

■Big news right here in Atlanta, as our friends and long-time *C.I. Advertiser, Workout Anytime*, announce a new Owner and CEO. **JERRY PUGH** is his name, and you can read all about it in the **Press Release** on **Page #3**. Please also check out their Ad on **Page #24**. Congratulations

to my friends, **JOHN QUATTROCCHI** and **STEVEN STRICKLAND**, and **Stay Tuned Folks!**

■Sad news from our friend, **EDDIE TOCK**, CEO of *REX Roundtables*, as he informed us that *REX Founder, WILL PHILLIPS*, has passed away. Please see the full news item on **Page #18. MAY WILL PHILLIPS REST IN PEACE.**

■Unfortunately, we have more sad news, this time out of Baltimore. If you've spent any time commuting around the Baltimore area, chances are you've heard of **BRICK BODIES**, the local family-owned health club chain that was founded by **VICTOR and LYNNE BRICK** before handing the reins to their daughter, **VICKI BRICK** as CEO. I'm sad to report that Vicki has passed away after a battle with ovarian cancer. **MAY VICKI BRICK REST IN PEACE.**

■**MARCO FIORINI** has been named President/CEO of the *Cincinnati Sports Club (CSC)* in Cincinnati, Ohio. Marco began his career with the club in August of 2013 as the *Risk & Security Director*. He was promoted to *Operations Manager* in June 2015 and became the *Interim*

General Manager in March 2020 during the COVID-19 Pandemic. He completed Xavier University's *Executive MBA Program* in December 2020 and was appointed to *General Manager* in 2022. The club continues to enhance the member experience each year with continual improvements. In 2024, the *EGYM* smart strength training system; recovery area, which includes a dry sauna and three cold plunge pools; and a new boutique exercise studio featuring 40 *HIIT* classes, were added. Still on the horizon for 2025 are: an adult bar/lounge and co-working space for the indoor pickleball viewing area, as well as a new pro-cushion surface for the outdoor tennis and pickleball courts. The Cincinnati Sports Club team will continue to build on the 35-year success of the constantly improving, reinvesting and growing locally and privately owned single location club that sits on an expansive 16-acre campus. Be sure to check out the *January 2015 Cover Story Classic* on CSC at [www.clubinsideronline.com/archives](http://www.clubinsideronline.com/archives). **Congratulations Marco Fiorini and our friends at CSC!**

■Myzone has made another significant addition to its team as it prepares for a



Norm Cates

new phase of growth and expansion. **JO WALKER** has been named *Head of Brand and Communications*, bringing a wealth of experience in fitness and wellness within the SaaS sector. Walker has held marketing roles at *Xplor Technologies* and *EverCommerce* and most recently served as *Chief Marketing Officer* at *BOX12*. Her expertise in building brands and driving data-driven strategies means she is well

(See **Norm's Notes** Page 7)

## About Club Insider

### CELEBRATING 30+ YEARS OF TRUST

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## Thanks and Appreciation

At *Club Insider*, we are excited to be in our **32nd Year** of this home-based health and fitness club trade publication! The thought that this publication was founded to serve an industry I truly love, and so that I could become a *Mister Mom* for my son, **Justin**, is still intriguing and amazing to us. So, I wish to extend my most sincere **Thanks and Appreciation** to everyone who has made this amazing 30+ year run possible.

Very sincere **Thanks and Appreciation** go to **Rick Caro**, the late **Dr. Gerry Faust** and the **Faust Executive Roundtable #1** for helping me decide in 1993 what my home-based business would be. **Thanks and Appreciation** to my long-time friends, **Ron Hudspeth** and **Cathy Miller**, formerly of **Atlanta's Hudspeth Report** for the tremendous assistance they provided. **Thanks and Appreciation** to all of the folks at **Walton Press** in Monroe, Georgia. They did an absolutely excellent job for us all these years and printed every one of our monthly printed editions! And, of course, **Thanks and Appreciation** to the **United States Postal Service** for sending those editions to our readers!

Now, as we have gone all digital, **Thanks and Appreciation** to all of our **READERS**. Sincere **Thanks and Appreciation** to our **Club Insider Advertisers**, past and present, for their kind and dedicated support of this publication. **Thanks and Appreciation** to all of our **Club Insider Contributing Authors**, past and present. **Thanks and Appreciation** to the **Health & Fitness Association** for all it does for all of us. And, sincere **Thanks and Appreciation** to my son, **Justin**, our **Publisher**, who is a truly great business partner. You name it and Justin does it each and every month!

Last, but surely not least, this writer who refused to fear failure when many told him he didn't have a chance of surviving the publishing business for even a year did survive. And, he would like to give his sincere **Thanks and Appreciation** to the power that made that survival happen: **God**.

Very sincerely, with love in my heart for you all,

*Norm Cates, Jr.*



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# "Insider Speaks"

## Clearing Up Misconceptions About HFA Research on Public Policy

By: Anton Severin

**Publisher's Note:** In response to **Steve Vucovich's** "Insider Speaks" column last month, I received various feedback from both sides of the issue discussed. Very importantly, though, I welcomed feedback from the source: *The Health & Fitness Association*. At Club Insider, we will always stand by and support the Association in whatever ways we can, but we will also stand by and support those supporting the Association whenever a disconnect may occur. Only with all of us working together can we bring the industry to where it needs to be, now and in the future. To that end, thank you to **Anton Severin** for the following column in response to Steve's, convening this conversation.

■ ■ ■

The *Health & Fitness Association* (HFA) has received feedback from a few fitness facility operators who have questioned the relevance of our recent research report, *Reversing the Physical Inactivity Crisis - Fitness Affordability as Strategic Policy*. Produced in collaboration with *Portas Consulting*, this report is part of a growing portfolio of HFA research that explores the issues, opportunities and partnerships shaping the global health and fitness sector.

As Vice President of Research, my role is to ensure that our work not only tracks market trends but also provides strategic insights aligned with HFA's broader mission: to grow, promote and defend the health and fitness industry. I encourage all stakeholders to review

*Reversing the Physical Inactivity Crisis - Fitness Affordability as Strategic Policy* in full. It presents a compelling, evidence-based case for public investment to expand access to fitness services, including through increased engagement with fitness facilities. The research spans ten countries, including the United States, and the methodology is transparently documented in each country's appendix.

Crucially, this report is designed for policymakers and industry advocates. Public officials need credible data, not anecdotes, to support legislative initiatives like the *PHIT Act*. This research delivers just that: fact-based talking points to help make the case for smarter investments in physical activity.

**Why does that matter?** Any policy proposal involving a cost to public treasuries, whether that involves income tax deductions or credits for fitness expenses, cuts to sales taxes or other financial incentives, must be justified by measurable outcomes. This report illustrates how well-designed policies to increase fitness affordability can yield meaningful returns for both public health and the economy.

**Let me be clear:** this research does not recommend that club operators lower prices independently. In fact, doing so without public support could strain operators and risk limiting access rather than expanding it. Nor does the study suggest that modest discounts alone will transform every individual into a long-term member. What it does show is that when governments subsidize access to fitness, non-participants are more likely to engage, and

greater participation leads to better health outcomes. The report makes clear that affordability is just one part of the solution, noting that increasing physical activity also requires addressing other critical barriers, such as motivation, capability and access to convenient facilities.

If the fitness industry wants to be part of broader public health and economic policy conversations, on par with sectors like healthcare, food or insurance, we must present evidence that demonstrates our societal value. That is exactly what this report aims to do.

At the same time, advocacy is just one part of our research mission. Providing operators with actionable market insights remains a core focus of our work. Our recently released *2025 U.S. Health & Fitness Consumer Report* offers a detailed snapshot of participation trends across key demographics in 2024, and upcoming benchmarking studies will provide fresh data on operational and financial performance, as well as compensation and benefits. These resources are designed to help operators make informed decisions, stay competitive and grow sustainably.

### HFA Advocacy Is Your Insurance Policy

Without credible, data-driven arguments, our industry risks being overlooked in important policy debates, as we saw during the pandemic. HFA's mandate is to ensure the industry has a seat at the table before, not after, decisions are made. That starts with showing why fitness is an essential service, not just a discretionary one.



Anton Severin

Research plays a vital role in this effort. But, it only works when industry leaders and operators help amplify the message. We must continue telling the story that fitness is a public health solution, not just a personal lifestyle choice.

HFA will continue investing in research that strengthens our advocacy voice. This work is only possible through the support of our members. By funding research, the industry is investing in its own future, ensuring that fitness is recognized as a critical part of the public health infrastructure, with measurable benefits for society at large.

(Anton Severin is the Vice President of Research for the Health & Fitness Association. He can be reached at: [aseverin@healthandfitness.org](mailto:aseverin@healthandfitness.org).)

## U.S. Health Club and Studio Memberships Increase to Record 77 Million

**WASHINGTON, D.C.** - A record 77 million Americans, or 25% of people aged six and older, were members of a gym, studio or other fitness facility in 2024, according to new data released by the *Health & Fitness Association* (HFA). When including non-member users, total fitness facility customers reached nearly 96 million, representing close to one in three Americans (31%). The rise in gym and studio participation signals growing interest in structured fitness, as the number of facility members increased by 20% between 2019 and 2024.

Even with this encouraging growth, most Americans still fall short of physical activity guidelines. According to *Centers for Disease Control (CDC)* estimates, three in four Americans aren't meeting recommended levels, highlighting

the continued need to expand access and reduce barriers to healthy movement. Affordability remains a key part of that equation. While budget-friendly gym brands have rapidly expanded in recent years, cost is still one of the most commonly cited obstacles to structured exercise.

One proposed solution is the *Personal Health Investment Today (PHIT)* Act, which would allow individuals to use pre-tax dollars from Health Savings Accounts (HSAs) and Flexible Spending Accounts (FSAs) to cover fitness-related expenses, including gym memberships, fitness classes, youth sports fees and equipment. Recently reintroduced by a bipartisan group of lawmakers, the bill enjoys broad support, including from nearly nine in ten Americans, according to recent HFA polling.

"This report signals the impact our industry is already having and how much more we could do with the right support," said **Liz Clark**, President and CEO of the *Health & Fitness Association*. "Fitness centers are engines of wellbeing, connection and community. But, for millions of Americans, the cost of access remains a barrier."

Additional findings from the report, *2025 US Health & Fitness Consumer Report: Headline Trends*, include:

- Studios were the most popular type of facility, with 23.1 million members in 2024, followed closely by fitness-only gyms with 22.2 million members.

- Average member attendance has stabilized around 1.5 visits per week, down

from 2.1 in 2019, reflecting evolving habits as many Americans now supplement gym use with outdoor, at-home and sport-based physical activity.

- The typical member has trended younger, more male, less affluent and more ethnically diverse in recent years, reflecting changing engagement patterns across the population.

HFA, the nonprofit trade association representing fitness facilities and suppliers, is calling on policymakers, employers and healthcare leaders to recognize the industry's role in addressing the physical inactivity crisis and building a healthier, more active America.

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## ...Norm's Notes

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placed to help shape Myzone's next chapter. Reporting to *Global Marketing Director*, **TOM DAVIES**, Walker is the latest in a series of key appointments made by the leading wearable fitness technology brand, aimed at driving product development and business growth. **Congratulations to Jo Walker and the Myzone Team.**

■ Folks, I felt Y'all would appreciate the following item I discovered in the April 13th Edition of *The Atlanta Journal Constitution* newspaper, and I quote it exactly: "**GOOD FRIENDS ARE WELL WORTH THE EFFORT** by BARTON GOLDSMITH, PhD. If you are feeling low and can't bring yourself to go anywhere, pick up the phone and call a good friend. It will make you feel better about your life... and yourself. Hearing the voice of someone you care about and spending a few minutes getting involved in their world can give you a new perspective on life. Friendship is highly underrated! It can make a difference between a life of joy and one of depression. For someone with acute anxiety, however, making friends can seem next to impossible because the

fear that comes with anxiety can cripple you and make you incapable of reaching out to someone else. To get past this, try these tips:

■ Get in touch with an old friend. Knowing that you can call and count on someone being there for you can be empowering and a great comfort. If there is no one in your life like that at the moment, think back to who has supported you in the past. What happened to those people? Maybe it is time to rekindle those relationships, and you can do it from the privacy of your home simply by sending an email or a text. It doesn't have to be long or dramatic... just a quick "Hello" can begin the reconnection process.

■ If you want to *have a friend*, *learn to be a friend!* Giving what you want to receive is the best way to show someone how good a friend you can be. People usually like us because we like them. So, let another person know that you would like to be friends. By establishing that you are friends, you will let the positive emotions sink in.

■ Be around people who don't judge you and who support you. Having others in  
(See **Norm's Notes** Page 8)

Make  
It  
Fun!

## ...Norm's Notes

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your life who accept you for who you are is important. Feeling judged can be painful.

■ Share what's going on in your life. You will feel stronger in just knowing that someone really understands you. *The best friends are good listeners.* When you've received confirmation that what you are dealing with is real and that your emotions are appropriate to what's happening, you will feel better about yourself."

■ Folks, not very often do I write about my private life in these **Norm's Notes. Today's different.** Let me explain to you WHY. As I type this, it is Sunday, April 6, 2025, and I'm going to tell you all about an amazing experience my wife, **ILENA**, and I, had last night... *this is an experience that will live with us forever.* This was such an amazing experience that it's even made me want to

tell y'all about it! And, at the same time, I'm tipping **My Black Cowboy Hat** to the entire family of my long-time friend, the now late **J. CLARKE DAVIS.** Let me also add that I'm writing this Norm's Note, even though it is NOT about the club industry, because J. Clark Davis was one of the most amazing human beings I've ever known. Clarke was a long-standing member, along with me and about 50 others, of a group called *The GREAT CHARACTERS of ATLANTA.* I inherited the stewardship of this group long ago from a good friend of mine when he moved to Costa Rica to live. He was the former *Atlanta Journal Constitution* newspaper's daily lifestyles columnist, the now late, **RON HUDSPETH.** Today, this Norm's Note is not just to remember and honor our great friend, J. Clarke Davis, it is to be very sure that everyone in Clarke's Family knows what a **TRULY AMAZING** and **WELL-DONE CELEBRATION OF LIFE** they produced for him last night! So, congratulations to all who were involved in

the preparation and production of this very special and truly great event! **MAY THE ONE AND ONLY J. CLARKE DAVIS REST IN ETERNAL PEACE.**

■ *One more item* about Clarke's special event I just mentioned. There was a terrific company called *LUXE BOOTH ATLANTA* videotaping comments by Clarke's friends at his Celebration of Life. Check out [www.luxebooth.com](http://www.luxebooth.com).

■ **JUSTIN** and I want to **THANK YOU** for reading Club Insider! We appreciate you being with us. And, in particular, **WE VERY SINCERELY APPRECIATE ANY and ALL SUPPORT OF OUR ESTEEMED Club Insider ADVERTISERS! PLEASE DO BUSINESS WITH THEM and WHEN YOU DO, PLEASE TELL 'EM Club Insider SENT YOU! THANK YOU ALL!**

■ **God bless our troops, airmen and sailors worldwide and keep them**

**safe. Thank you, Congratulations and Welcome Home to all of our troops who have served around the world. God bless America's Policemen and women and Firemen and women; keep them safe. Finally, God bless you, your family, your club(s) and your members. God Bless America! Laus Deo!**

(Norm Cates, Jr. is a 50+ year veteran of the health, racquet and sportsclub industry. He is the Founder and Tribal Leader Since 1993 of Club Insider, now in its 32nd year of monthly publication. In 1981, he was IHRSA's First President, and a Co-Founder of the Association with Rick Caro and five others. In 2001, he was honored by IHRSA with its DALE DIBBLE Distinguished Service Award, one of its highest honors. And, in 2017, he was honored with Club Industry's Lifetime Achievement Award. You can reach Norm by phone at **770-635-7578** or email at [Norm@clubinsideronline.com](mailto:Norm@clubinsideronline.com).)

## ...Crunch

continued from page 3

says **Tony Scrimale**, CEO of CR Fitness Holdings. "This 3.0 location takes everything our members love about Crunch to the next level, with premium amenities, the latest equipment and a fun, welcoming atmosphere that caters to everyone."

At Crunch Colleyville, fitness enthusiasts will find an impressive range of

top-quality cardio and strength equipment, perfect for any workout routine. The facility also boasts a dedicated group fitness studio for a variety of dynamic classes, a Hot Studio designed for yoga and Pilates and Ride cycling classes for those looking to add some energy to their fitness regimen. For those seeking more intense training, there's a HIITZONE area featuring indoor turf for functional exercises and high-intensity workouts.

The gym is designed with luxury in mind, offering tanning services and HydroMassage beds to help members relax after their workouts. Spacious, modern locker rooms complete the experience, providing everything needed for a smooth and comfortable visit.

CR Fitness Holdings, LLC, led by industry veterans **Vince Julien, Geoff Dyer, Tony Scrimale** and **Jeff Dotson**, now operates 75 locations across Texas,

Florida, Georgia, North Carolina and Tennessee. With the opening of Crunch Colleyville, the company continues its mission to provide high-quality, affordable fitness options to communities across the country.

See the **Crunch Ad** on Page #2.

## ...Workout Anytime

continued from page 3

available to everyone. Under Pugh's leadership, the company enters a new chapter fueled by personal experience, proven franchise success and a passion for helping others.

"Jerry's journey from franchisee to CEO is a testament to his dedication and vision," said Strickland, Co-Founder of *Workout Anytime*. "His leadership will undoubtedly propel *Workout Anytime* to new heights while staying true to our mission of empowering both our members

and franchisees."

This milestone for the brand is supported by strong financial and strategic partners. Financing is provided by two experienced firms. *Skyline Global Partners*, a Chicago-based lower middle-market private equity firm, specializes in buyouts and growth equity investments across the U.S. and Canada. The transaction was led by **Ross Christianson** and **Nav Kalsi**. Additionally, *Peninsula Capital Partners*, based in Detroit, has provided support through its structured junior capital solutions. Since 1995, the firm has been instrumental in supporting middle-market

transactions. **Chris Gessner** led the transaction for Peninsula. The transition is further supported by *Private Capital Advisors*, with **Peter Stipher** leading the Mergers & Acquisitions (M&A) process to ensure a smooth leadership transition and continued post-merger support.

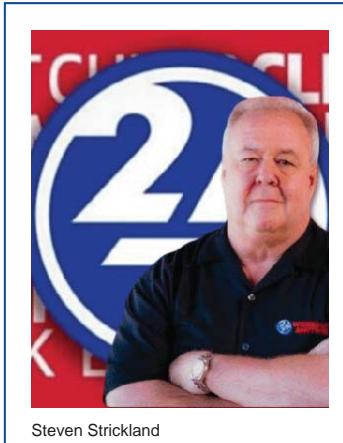
As *Workout Anytime* continues to expand its footprint across the country, this announcement marks an exciting new chapter for the brand. With Pugh at the helm, the company is poised for even greater growth, leveraging his deep experience and passion for the brand to drive innovation and elevate the member

experience. Supported by a strong network of financial and strategic partners, *Workout Anytime* is committed to making high-quality fitness more accessible to communities nationwide. As the brand looks to the future, this leadership transition signifies not just a moment of celebration, but the beginning of a bold vision that will shape the next phase of growth and success for both franchisees and members alike.

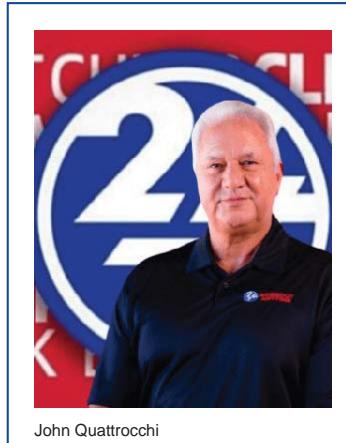
See *Workout Anytime's Ad* on Page #24.



Jerry Pugh



Steven Strickland



John Quattrocchi



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## ...The Schwartz Family

continued from page 3

consider this statement true whether this is your first day or 50th year in the business. So, we invite you to grab one or two of your favorite beverages, sit back, relax and read the story of the *Schwartz Family and 50 Years of Success at Midtown Athletic Club!*

### An Interview With Alan Schwartz, Co-Founder and Chairman of Midtown Athletic Club

**Norm Cates (NC)** - My friend, **Mr. Alan Schwartz**, it's another real honor for Justin and me to be on the phone with you today for your second *Club Insider Cover Story*, with your first one having been in March, 2002. Now, Alan, in honor of the **50th Anniversary** of your amazing Chicago-based organization, Justin and I are thrilled to be producing this amazing 50th Anniversary story for our readers. However, before we get started, let me wish you a **Happy 89th Birthday on November 7, 2020** while we're producing this cover story! That's awesome, Alan! And, Justin and I want to thank you for giving us a chance to do this story with you, your son, **Steven**, and grandson, **Alex**. Having reviewed your amazing cover story that we did with you and Steven back in March, 2002, I want to make this very sincere comment based on my knowledge of your life at this point: *Alan, IF there was EVER a guy whose life story would make a really terrific subject for a great movie, it's you, Alan Schwartz! So, let's get to work on your 50th Anniversary Cover Story.*

**Alan Schwartz (AS)** - Thank you very much, Norm. Some days, the body feels it... my mind never does... but the body does!

### Key Early Moments/Memories

**NC** - First, Alan, let's begin with your going back and taking us through some of the key moments/memories of those very early days some 50 years ago.

**AS** - The first memory that strikes me was sitting down with my Dad, **Kevie**, and noodling, actually over a period of better than a month, on what the hell we could do together that we would enjoy doing. That's because, aside from being a father and son, we were very good friends. And, indoor tennis was **HIS IDEA**. He said, 'Okay, I taught you how to play tennis. You love the game. We've both have an entrepreneurial spirit. And, if we're going to do it, let's do it big. Let's build the world's largest indoor tennis club!' *That certainly was a striking moment*, and as soon as he said that, I said to him, 'You know... that's it!' We had discussed a bunch of things, real estate deals, etc., but none of them got me excited until that one! Other ideas had not gotten him excited, either. *But, that one hit us both and got us BOTH EXCITED.*

Then, he found a piece of land, and we realized that there was *no zoning*



The Late Alan Schwartz

code for this in the City of Chicago! We thought that, if we got into the manufacturing district, that would take care of it. He said, 'We're going to hit a couple of hurdles. One of them is getting the mortgage that we need to do this. And, the second one is the zoning. I'll take care of working with building commissioner Fitzgerald, and I will write the Zoning Code for indoor tennis with him.' And, then, I went out to get the mortgage! Well, he got the zoning code done a hell of a lot sooner than I got the mortgage because **I was turned down 16 times! Literally! Literally 16 times!**

**NC** - Trust me when I say that I know exactly what you're talking about because I've been there and done that!

**AS** - And, I'm talking about guys I went to school with and who were very good friends. They went to business schools, they were the bankers, etc. You were best friends with them *until you came in and tried to borrow money for a tennis club!* Finally, my wife, **Ronnie**, came to me one day and she said, 'Alan, I just saw a *Time Magazine* story about a school friend of yours named, **Don Parsons**, who was written up as being the most disliked

banker in Detroit.'

She explains, 'He's the *Head of the Bank of Commonwealth*, and he's disliked by his banker competitors because he's paying more interest than anyone else. They all have a cozy little group paying very little interest to the depositors, and he's paying almost double to the depositors. He's really raking the deposits in, and he's breaking up that little fraternity they have there! *Maybe he will be interested. Why don't you call him?*

So, Don Parsons was the 17th banker I called. First of all, Don is about 6'4" and weighed about 140 pounds. Our friends called him, 'Shaky Don,' because with that height and no bulk on him, he'd shake a little bit. When I called him in Detroit, I asked him, 'Don, what do I call you now?' And, he said, 'You can continue to call me Shaky!' (he was laughing) And, he asked, 'What are you doing tomorrow?' So, I flew up to Detroit the next day with all the artist's drawings and renderings I had from having already been turned down 16 times. I had all the projections you could think of... best case, worst case, etc. When I got up there, we sat down, and he wouldn't do anything but talk about our fellow classmates for about a half hour! I knew I didn't have that much time with him, so I finally said, 'Well, Don, I have to remind you I came up here to talk about my tennis club idea...' He said, 'Ah, Alan, don't worry about it. What were you looking for?' I told him, and he immediately responded, 'You've got it!' And, I asked, 'What do you mean, you got it? I hauled up all these exhibits.' (pointing to renderings and projections)

He explains, 'Look, it's pretty pictures you're going to show me. I'm sure of that, so don't bother. And, as far as projections, you're probably going to tell me that you're going to lose money the first year, break even the second year and make money the third year.' I said, 'Yes, that is what it says!' So, he continues, 'Are you going to tell me how much a court

should cost? I have no idea how much a court should cost! I have no idea if women will even go inside the place at night. That's your problem. That's not my problem! Then, I asked him, 'Why in the hell are you making the loan?'

Don explained, 'Alan, you were the only guy on the varsity tennis team who would come down and play with us guys on the junior varsity team so they felt like they were part of the action. There I was, never able to make the varsity, but you still came down periodically to hit a few balls with me. I appreciated that. I knew you were a leader then. Second of all, you would kill yourself before you lost! So, I'll take a chance you will do the same thing on this deal.'

**NC** - That is incredible.

**AS** - Norm, I thought a lot about the answer to that first question. I also have a third very special memory from the very beginning that I feel clearly qualifies as one of my most outstanding memories from the very early days. The timing is great for this third memory. 1968 was the same year that Open Tennis became open so amateurs and pros could play together. Wimbledon had the Amateurs and the Pros in the same Championships. There was excitement! I knew that, somehow, to survive long-term, Midtown would have to create players and not just rely on tennis going 'Open.' You had to keep replacing players, so I worked with a top pro from Rochester, New York named **Spike Gonzalez**, no relation to Poncho Gonzalez.

**NC** - Yes, I know Spike (See *Club Insider's July 1997 Cover Story*).

**AS** - Together, Spike and I put together what was the only program on how to teach tennis that the U.S. Government ever gave a U.S. Patent to. It was called *Tennis in No Time*, and we still use it! It was designed to teach people who had never played tennis or maybe had just played a little at a summer camp or at a public park and get them involved and make it fun for them.

### The Family Dynamic

**NC** - Alan, you started your business (then TCA) with your father, **Kevie**, so essentially, with your son, **Steven**, and grandson, **Alex** involved, it's now a fourth-generation business. **INCREDIBLE!** I know your father taught you a lot. How did he carry that knowledge over to you so that you could acquire the knowledge and pass it to Steven?

**AS** - The first thing he told me was real simple. He said: 'I want you to know that, for the rest of your life in business, if you shake hands, that's a deal. I don't give a damn if it's in writing or not, it's unshakable.' And, that has been with me ever since.

The second thing he said was: 'I expect you to have a strong work ethic. If that means 70 hours a week, then it's 70 hours a week. If you want something, then

(See *The Schwartz Family* Page 12)

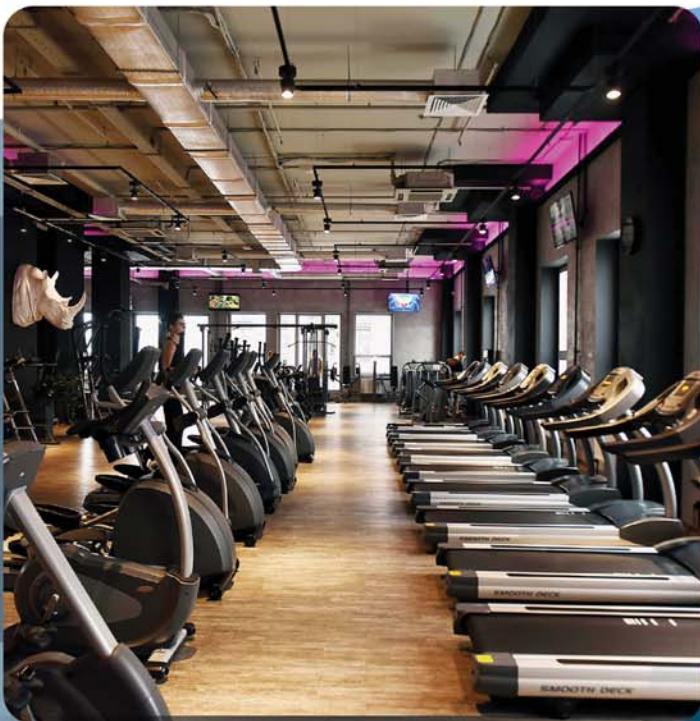


Midtown Athletic Club Chicago

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## ...The Schwartz Family

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be prepared to put in the hours to get it.' He was a big, strong, bright, hardworking, creative guy. He was a force in his own right.

The third thing he told me was: 'If you ever want to get anywhere, you've got to be willing to delegate because you can't do it all yourself; you've got to have a team. You're going to respect them, delegate to them and not hover over them. If they make a couple of mistakes, so be it providing it's not a fatal mistake. As we bring people into this company, we're going to delegate to them and give them a chance to fly, be their own person and be excited about being that person!'

Those were the big three, but there's one other thing he said: 'Be rounded enough so that, in defining yourself, be sure you are more than just your job. It may be you as a contributor to society... you as a human being... it's NOT JUST YOUR JOB. Be comfortable with the rest of things you do, be a contributor, be a giver and not a taker so you will be proud and feel good about yourself.'

**NC** - Given Steven worked elsewhere before entering the family business, how did you transition him into the business?

**AS** - Since he was 10 years old, which he was when my Dad and I first got the idea of building the club, we used to talk a lot around the dining room table about the successes and the failures of each day. The frustrations and the good things. Steven was a very good listener, and he participated in the discussions at a very early age. So, he knew about things, even though he was only ten years old. He seemed to understand, and he actually did. He knew the struggles in the beginning, and he remembered my coming back with those 16 turnabouts and many of the hurdles my Dad and I experienced in our effort to get our first deal off the ground. So, he had that background and a great deal of awareness. That was the easy part of the transition.

The *difficult* part of the transition, and it was difficult, was when he got out of *Cornell University*, he spent a couple of years as a consultant and four years with *Hyatt*. He earned a position reporting directly to the owners of Hyatt, the **Pritzker Family**. He got a hell of an education there, and that also placed him in a position where I was the one who was chasing him to join our family business! He was getting a lot of responsibility and good compensation at Hyatt. In fact, when he was 27 years old, he was their *National Director of Development*. But, then, we sat down and had a heart-to-heart talk about the *difference between salary and equity*. I said to him that he was earning a handsome salary, but the Pritzkers would never let go of any equity in their business. Theirs was a family business, and they would keep it that way.

So, with some conditions that he laid down and I accepted, he came in with enthusiasm. And, his transition was eased because he brought with him a perspective that he got from the Pritzkers that was fresh and different. I was not just the teacher. He was bringing a new perspective and teaching me at the same time! I'll give you one example. He said, 'Dad, whenever a deal comes up and someone introduces it by saying: *It's a strategic deal*. What that means is: *It loses money right now... but we're justifying it some other way*.' He added, 'So, do me a favor. Let's see if we can not get involved in any strategic deals that are losing money. Let's see if we can get some that are making money and are also strategic as we move ahead.'

I always remembered that. I thought to myself how I wanted to buy into a certain deal, and he would say, *'That sounds like a strategic decision you're making to justify buying that loser.'*

**Justin Cates (JC)** comments: 'In my interview with Steven yesterday, we had a talk about strategic vs. opportunistic growth, so you guys are in alignment.'

**AS** - Well, that's great because Steven and I didn't discuss my interview today ahead of time.

**NC** - When did the official handoff occur? What's your role in the company now?

**AS** - That's a good question. There's a specific period of time that took place. In 2002, I was nominated to become *First Vice President of The United States Tennis Association (USTA)*, which is a 2-year term, from which you almost automatically move on to be President, I saw what the path was going to be. So, I said to Steven, 'If I'm going to do the jobs of *Vice President* and *President of the USTA*, then I'm going to do it right, which means I will be out of here 50 - 60% of the time over a period of 4 - 6 years! We need to spend the first year getting this transition moving, so

that, before I take the Presidency, you are running it and people KNOW you're running it. So, when the bankers call up to discuss something, they ask for you and not for me.'

At that point, I stopped going to any meetings with the bankers, and I kept referring decisions to Steven. He liked that way a *lot*, which was *great!* I knew it would also be wrong to step back in six years later and ask Steven to step back after that kind of absence, an absence which turned out to be eight years! I felt this way even though I still stayed involved in the business. He stepped up and did an excellent job. He deserved to keep it.

**NC** - Gotcha. That was close in time to our March 2002 Cover Story with you and Steve. My son, Justin, who's now *Publisher of Club Insider*, asked Steven to share his perspective on all of this. So, let me now ask you. Alan, from the point of view and perspective of the Dad: What positives and negatives did you experience being involved in and running a family business with your son?

**AS** - That's probably the *most difficult question you've asked*. Before I answer your question, Norm, let me say this to your son. Justin, your Dad was so proud of you that all of us who received *Club Insider* really knew how you did in every football game since you were 13 years old and after! I'm not kidding. You have a father who really cares about you. I feel lucky the same way. But, Justin, you're very lucky. Your Dad was very proud of you, and he let everybody know it!

**JC** - Thank you. That I am!

**NC (laughing)** - Alan, thank you for that... for remembering those proud writings of mine about Justin's football efforts. That's been a great joy for me. I think it would be easy to say you and I are Blessed Dudes!

**AS** - I thought for quite a while about this question, and it finally boiled down to the

most difficult thing being to find the right balance between being a father or son and being a colleague. How do you find a balance between being a father and a colleague... and a friend... and a peer? Someone you can just have a beer with afterwards and let it all out, but at the same time, show the respect you learned when you were the son and that you hoped to have from your son when you are the father. There were some times when one of us would get upset and say something really harsh to the other one, and then, it took a while to be able to separate the fact that they weren't criticizing you, *they were just criticizing a particular thing that you did*. *That's DIFFERENT than criticizing YOU!* At first, I did take it a bit personally when my Dad would come at me and say something like, *'With all the education you had, how could you conclude something that illogical?'* Sometimes, he added a word in there you wouldn't print in your magazine!!!

**NC** - Would one of them begin with an 'F'?

**AS** - Right, Norm... and it would end with '**ING!!!**' (laughing) Then, the other way around then; sometimes, I would catch it from Steven when he would say something like, 'Keep out of this one because you're discussing this with other people when you're out of touch!' I would think: What do you mean I'm out of touch? But, he'd be right, particularly when it came to the latest in fitness. They couldn't ever get me out of touch on tennis or finance, but I was out of touch on fitness and the latest in technology.

Seriously, though, I really enjoy being Steve's friend. *Steven is my best friend. I will make that as a flat-out statement.* He's got many other very, very good friends, too. And, one may, in fact be, his best friend. But, at this point, he is mine. And, he's developing that relationship quickly with his son, Alex, whom I'm very fond and extremely proud of.

In conclusion, it's that balance that was the most difficult thing. I think I've got it now, because at this point, I know that, if I say something harsh to Steven, he knows I'm not criticizing him but rather a particular act or conclusion. And, vice versa when Steven voices criticism.

**NC** - That's a great *balance* to have, Alan!

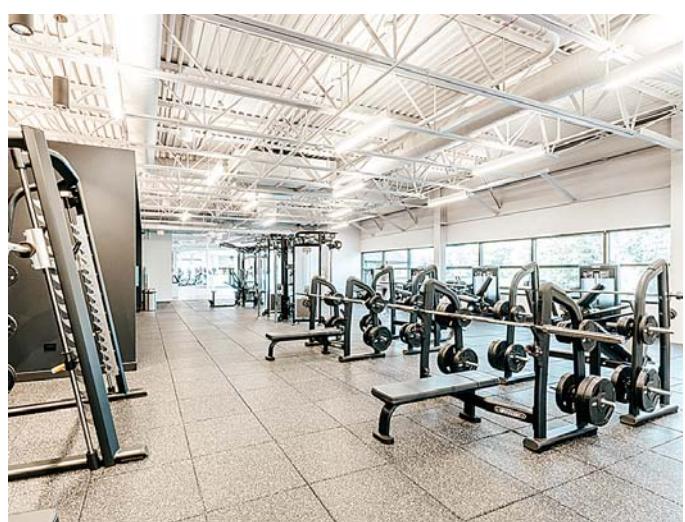
### Looking Back

**NC** - When you look back on your truly amazing career, what would you say are three of the most important developments/experiences you have had?

**AS** - The three most important thoughts I have are:

1. **Understanding that there is a time to cut losses on a given deal and doing so on a timely basis.** I think my tendency is to: *Keep after it! Keep after it!!!* I can't be that wrong! And, chasing it longer than

(See *The Schwartz Family* Page 13)



Fitness Floor at Midtown Athletic Club Bannockburn



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## ...The Schwartz Family

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I should and not recognizing I made a mistake. Cut your losses!

**2. You can't turn a battleship around in a lagoon!** I learned this big lesson as *President of the USTA*. They'd been in business for 125 years when I came in there. I stepped in, and I wanted to change some basic things in a major way. But, I'll tell you, it doesn't happen overnight... it doesn't happen in a month... it is literally a question of years! The battleship needs room and time to change course!

For example, before I even got to be First Vice President, I spent five or six years as a Board Member. The Board felt the most important thing that they had to do was run a successful U.S. Open Tennis Tournament. That was their main reason for being... to run those tournaments. The USTA owned that tournament, and they made a lot of money with that tournament. That was their goal. When I got on the Board, I said, 'If that's your Mission Statement, I joined the wrong Board!'

Then, we had a long discussion, and they asked me, 'Do you have a better idea?' I said, 'Yes, I thought about it before coming here. I've got eight words: To

**Promote and Develop the Growth of Tennis.** That's our Mission! It is NOT the U.S. Open. That's a vehicle to get publicity for our sport and some money to do **our real work**, which is to expand the sport and bring as much joy to as many people as possible.'

You have to understand that, at this point, there were two new members who came on the Board, a gentleman named, **Gene Scott**, and me. We were actually the first people in 125 years who ever made money from the sport to be on the Board! Before, if you were a tennis pro giving lessons, or if you were an owner of a tennis club, or if you were a writer and wrote books about tennis, or if you were a writer for a newspaper, you were barred from the Board. For some reason, they let that bar down and let the two of us on. Scott was a writer, and I was a club owner.

So, when I made the suggestion to, '*To Promote and Develop the Growth of Tennis*,' this same very stodgy Board said, '*Promote? What are we, hucksters? Growth? Is this cancer?*' I'll never forget that meeting! It was a long, long meeting! Finally, it was over, and I had swung a majority of the people over, adopting the new Mission Statement. Now, between the adoption of that and the implementation, there was a long road, and it took two years before they acted on and finally endorsed the new mission statement, which stands

unchanged today. So, that's why I use the example of turning a battleship in a lagoon.

**3. Appreciating the difference in skillsets of strategizing and implementing.** It's one thing to strategize. It's another thing to implement. And, if you're lucky enough to find one person who can do both, you're lucky. I was lucky. Steve has both, though he prefers strategizing. Don't downgrade someone if they don't have both. Fill the slots with two different people.

**NC** - What was the most FUN time/era you can remember in your amazing career?

**AS** - I think the most *FUN* year was clearly the *year before COVID-19*. Not just because it was our best year business wise, but it was the first full year I had with my grandson, Alex, in the business. If I had to pick one thing that we did a little bit of but I wish we'd done more of was that, on Wednesday afternoons, the three of us would get together and have lunch together. We'd talk business. We'd talk personal. I first sensed Alex had the skills to take over someday. I'm sure of it now. It's going to take him a few more years, but he will be ready. What could be more fun than having time with your son and your grandson at the same time!?

The other fun memory was during my first year as *USTA President*... I had

basically divorced myself of 90% of the day-to-day business that Steven was running. At that time, 17 years ago, the USTA budget was \$250 million a year! People don't realize that the USTA actually owns the entire U.S. Open Tournament, which generates \$250 million annually. In my day, it was \$170 million. If you've got that kind of money to reshape priorities, that's a lot of fun. You're not focused on where to get the funds from, you're focused on where to spend the funds wisely!

Combine that with the fact that, when you go to Wimbledon as *USTA President*, you sit in the Queen's Box seats for as long as you want. It's a two-week tournament. I did it for one week, but I was entitled to the full two weeks. One time, we were sitting in the Queen's box at Wimbledon when it started to rain. Who did I get to sit and talk with, one-on-one, for 30 minutes? None other than **Margaret Thatcher**! I mean, who is Alan Schwartz to be talking with Margaret Thatcher, one-on-one, for 30 minutes! **Bill Clinton** was there that day, and my wife, **Ronnie**, talked to him. When you go to the French Open, you sit with the *French President* and dine with him. Then, the most fun of all is when you go to Australia and sit with their great players of yesteryear (**Laver, Rosewall, Newcombe**, etc.)... they are the most fun-loving group of

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## ...The Schwartz Family

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people you will find. Those were the 'perks' of the job. The Grand Slams were highlights with much accomplished at Grand Slam meetings, but the rubber meets the road when the President meets with the local tennis leaders of *El Paso, Schenectady, Sioux Falls, Charleston and Oakland*.

### Closing Advice

**NC** - Given the wild times we're all now being forced to live with and operate in, what advice would you give to other club owner/operators who have been in our industry for many years?

**AS** - With all of its terrible ramifications, take advantage of COVID and get as lean as possible to survive without cutting muscle or destroying the club culture you've built... because there's a bright light at the end of the tunnel. You can come out of this much stronger, much leaner and ready for action once you've survived this. When you come out of this, your club will be able to be more responsive and quicker, and you will be more competitive than you were before. Justin and Norm, it's a lot easier for me to sit here and say this while my son, Steven, is the one who has to implement this thinking and make it work.

**NC** - To close this great interview, Alan, what key advice would you give to anyone who's thinking of and hoping to enter our industry and be successful at it over the long haul?

**AS** - I would say two things for sure:

**1. DON'T** go into the club business to get rich, because you probably won't.

**2. DO** go into the club business if it's a **passion**; because you have a chance in the club industry to positively influence more lives than you can in almost any other profession than I can think of. You can change lives. You can encourage people to socialize. You can change and modify their exercising habits. You can help people develop a skill that could be a fun skill the rest of their lives. You can help people develop discipline and teach them to follow regimens. And, along the way, you meet and help people meet other people. But, by and large, IF your only reason for going into our industry is for the money, I think you're missing the boat.

**NC** - Alan, I've looked up to you for many years. Thinking back on our times together many moons ago, I can't help but think about our experiences together. From those experiences, I remember what a fine gentleman you were in your business practices when dealing with me and others. To close this wonderful interview, Alan, do you have anything else you'd like to say to the folks in our industry?

**AS** - I think I can say comfortably that I've met very few people, if any people in this

industry who, once I got to know them, I didn't really get to like. I guess my parting words are that I feel lucky I got into this industry, especially the tennis part, which is such an important part of my life. I want to thank the many people I have met, I've become very friendly with and I've come to respect for adding a significant and happy dimension to my life.

**NC** - Well, this is another **World Class** interview **Mr. Schwartz**, and I tip my black hat to you!

### An Interview With Steven Schwartz, CEO of Midtown Athletic Club

**Justin Cates (JC)** - Where were you born and where did you grow up?

**Steven Schwartz (SS)** - That one is very simple. I was born in Chicago and raised in the suburbs of Chicago.

**JC** - Where did you go to school, and what did you study? Did you play any sports?

**SS** - I went to college at *Cornell's School of Hotel Administration*, graduating in 1981 with distinction. At Cornell, I was Captain of the water polo team and was lucky enough to do a stint in 1979 with the *Concord Club at U.C. Berkeley* under **Coach Peter Cutino**, the Olympic coach. Concord had many national team members preparing for the 1980 Olympics. It was hard as hell but a really fun time.

**JC** - When researching this story, I was surprised to see you didn't go directly into the family business after college. Please take us through that alternate path and how it led to Midtown (then TCA).

**SS** - I started out as a financial analyst at a large worldwide consulting firm, doing market research and financial feasibility studies for hotels, resorts and large real estate projects. I started in San Francisco and got transferred to their Phoenix office where we specialized in resort studies.



Steven Schwartz

and we had partners. So, I dug into the financial model on the fitness side of things. It was clear that multi-rec could be much more profitable if we learned how to do it well. That is how I ended up getting much more involved in the transformation of the company from primarily a tennis company to a multipurpose club company.

Ultimately, I felt we needed to change Senior Management, and my Dad, who is not really a fitness guy, was less interested and kind of looked at me and said, 'If you think you are so smart, you run it.' I hired an outside COO, but it didn't work out. I came into the business through the real estate and finance, not through the sales, programming or operations side, so I needed a great operating and sales partner. Thank goodness **Doug Cash** was at Midtown; he stepped up and did a great job advancing our company at that stage. Today, we have strong management teams led by **Jon Brady** and **Debra Siena**.

### The Evolution of Midtown

**JC** - Congratulations on celebrating 50 years in business! There is so much to cover. Let's start with the evolution of the company from back then to what it has become today.

**SS** - Thank you. My Dad was a successful real estate developer and one of the top tennis players in the region. He was a State champ, Western District champ and had nine National titles under his belt. He was very active in the competitive level tennis environment in Chicago, which was an outdoor experience centered around one club in Chicago called the *Edgewater Beach Tennis Club*, but there was no place to play indoor tennis.

At the time, the company was primarily a tennis and racquetball club business. I would periodically sit in on management meetings. Over time, I got more involved in the business. One of our managers and partners at the time wanted to expand significantly into the fitness business. It was a big investment,

The group of competitive guys he played with were all successful businessmen, so they got together and decided to build an indoor tennis club. Dad took on the leadership role among 20 or so partners, and they built the largest indoor tennis club in the world with 14 indoor courts. They built it with a real enthusiast's eye; everything was made to make the playing environment the best it could be. But, what they did that was very different at the time, really even today, is that they did not focus heavily on the advanced players and high performance juniors, or on just renting court time; instead, they focused everything on programming to teach tennis to beginners and to make better tennis players. So, it was all about teaching and training.

This is because they were smart enough to realize that it would be very easy to sell all the prime tennis time after work and on the weekends, but it would be very hard to sell the daytime hours. They focused all their energies on filling those softer times, and as a result, the culture of our company grew into one of programming. At that time, what most clubs did was they built a tennis club and rented a court to a pro who was an

(See **The Schwartz Family** Page 15)



EverybodyFights at Midtown Athletic Club Bannockburn



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## ...The Schwartz Family

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independent contractor. All of our pros were on staff, and as a result, we had an active role in how all the programming teaching was delivered.

Next, Dad started doing partnerships with other tennis buddies around the country who were looking to do the same as he did. They would talk, and periodically, we would become active investors and often be hired to run the club. We got involved in some cities that probably did not make sense for us in the long run, but it made sense in the limited view of tennis at the time.

In the late 1970s, early '80s, racquetball was blowing up, and TCA got into the craze. We partnered with **Bob Fitzgerald** and the *Courthouse Group*.

Bob ended up becoming a *President of IHRSA* and was the *President* of our company for a time. We grew to eight or nine racquetball clubs, and out of that came a racquetball and fitness club management contract at a newly built large multi-tenant office complex at O'Hare. That started our management business, now known as *Midtown Health*.

I joined in 1987, and as I said, I mostly did real estate development at that time. Around 1989 - 1990, we started

converting clubs to multipurpose. I sold all the racquetball clubs, and we continued to grow our management business through management contracts in corporate HQ facilities and then some hospital facilities. We started buying out the early investors and other partners, consolidating the ownership almost entirely. Many of these people had been invested for 20 years at that point; some had passed away, others moved out of state, etc. We also began selling or leasing our clubs in markets where we really did not feel we were the right person to be the operator or where my Dad had a friend who he thought would be a good tenant. We probably should have kept Boston; that was a good location for us, but we leased it to a true tennis fanatic, **Laury Hammel**.

Our reputation was growing, and when banks would foreclose on clubs, they would often contact us to help them work out the loan or to act as receiver. Occasionally, we would buy the club. That is how we grew, and around 1995 - 1996, we made a big play into the outdoor facility business with our *Bannockburn* location... we added a resort-style pool, much more dramatic outdoor facilities, beautiful tennis courts, and it did extremely well. So, that became the new mantra. We began to make everything like *Bannockburn*, and that wonderful resort-like experience was

very successful for us.

Around 2013 - 2014, the *City of Chicago* began changing the intersection where our original club was and took part of our land, including our fitness center and some locker rooms. We had never really converted the original indoor tennis club to the outdoor resort concept or added a significant/large fitness offering, so we decided to build a giant indoor sports resort, and we put a hotel on top of it. It opened in 2017, and that has been a dramatic game changer for our company.

**JC** - That is one heck of a ride over 50 years! And, it is clear how the different periods in the industry's history have influenced that evolution.

**SS** - Yes, it is important to know that we have reinvented ourselves a few times over 50 years. We started as indoor tennis, added racquetball, then fitness, then resort-like environments and now full-out hospitality with fine dining and a hotel. One of the most important things that we do is constantly reinvest our capital into reinventing our clubs.

### Midtown Today

**JC** - How many locations do you have today?

**SS** - Midtown has eight locations that we own, and Midtown Health has 23 locations

that we manage.

**JC** - I see you have a cluster of locations in Illinois, but then single locations are spread out from Canada, to New York, Georgia and Florida. What are the benefits of this? Challenges? Future opportunities?

**SS** - We have grown opportunistically, not strategically. What that means is when we saw a deal we liked, we bought it. We did not say, 'We want to go to Atlanta; let's look for clubs in Atlanta.' We said, 'Let's look for something that fits our investment model, wherever that may be.' The opportunistic expansion concept can be good and bad. It is a good way to get started, but at some point, you need to switch to be more strategic. You get better synergies if you can cluster clubs.

To build a club on our scale, you would be lucky if it cost \$20 million dollars or even \$40 million dollars. Chicago was \$85 million dollars. So, you do not want to be wrong. There are markets that can't support what we are doing. It doesn't mean it's a bad market, it's just not a market for Midtown.

**JC** - Please describe a typical location (square footage, amenities, services, programming).

**SS** - They average 150,000 square feet indoors on ten acres. They all have the

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## ...The Schwartz Family

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fitness that you would expect: the do-it-yourself fitness area and the various boutique, studio environments (spinning, boxing, yoga, Pilates, general group exercise, etc.). We have indoor pools, outdoor pools, indoor tennis, outdoor tennis, usually a basketball court, restaurant, spa services, higher-end locker rooms, etc. These are full-service sports resorts, and they also have expensive, upscale finishes

**JC** - So, you can never get bored in one of your facilities!

**SS** - No. And, in each one of those areas, we have a deep series of programs. For example, and obviously, in tennis, we have everything from beginner's tennis, or *Tennis in No Time*, where we bring people who never played tennis before, up to high-performance and leagues with all kinds of tournaments, private lessons, group lessons, etc. On the fitness side, there is personal training, of course, but many different pre-choreographed group exercise options, as well as our own developed spin, performance, dance and yoga programs. We have a really cool boutique feature we call *The Field*, which is our functional performance area, and we have a number of programs we have developed for that space. So, our offerings are deep. When a member joins Midtown, they receive a rich mix of fitness programming to sample from and dive deeply into.

**JC** - What is a truly unique thing found at Midtown?

**SS** - I think what you have in Midtown is more space, and that space is thought through as a social environment so that you do not just come in, work out and leave. You can come in, work out, see friends, chat, hang out and be very comfortable doing all of it. Space is a luxury, so most clubs have to take advantage of every square foot that they have. What we have done is to make sure we are not as efficient as the other places.

**JC** - Wow, that is a different thought.

**SS** - The reason for that is that you want a little breathing room. Space is luxury. Starbucks has a place where you can sit. If they were overly efficient, it would just be a counter. It is very typical to go into a health club and hear them say, 'We have a community social space.' Sure enough, there's a TV with two couches or a couple of chairs and a rug, and it is surrounded by fitness equipment. That is not a communal social space.

A communal social space is a place where you actually do not see any equipment at all. You can't see fitness equipment when you check-in at any one of our clubs. I do not want you to see the fitness equipment. I do not want you to even see any of the sports. I want you to check in like you are checking in to a hotel

or going into a fancy restaurant. This is an entrance experience that does not involve hurrying in to get your workout done. It is a place to relax.

Much has been made about the third place, if you have heard of that.

**JC** - I sure have, and we have written about it a few times. Frankly, I try not to write about it as much now just because it has become so cliché.

**SS** - It is a cliché, but Midtown is a genuine third place. And, now during COVID, it has become a second place. Since home was the first place and work was the second place, for those now doing both at home, Midtown was needed even more, and it has become many members' second place. If you are working from home all the time, you need to go somewhere just to get out.

**JC** - That makes a lot of sense. That is a really well-thought-out concept given the world in which we live today.

**SS** - I like to say, 'We got a promotion: From Third Place to Second Place.'

### The Membership

**JC** - Let's talk about your membership. First, what are the typical market demographics? Any key differences between markets?

**SS** - They are not exactly the same, but they do have certain similarities. We don't strategically look at a map and say, 'Here is our demographic; this is where we are going.' Instead, we look at opportunities and ask ourselves, 'Do they fit?' We are looking for areas where there is significant density of higher income, meaning \$150,000 per household minimum and then dissect the higher categories above. It is kind of that simple. Our average age is probably in the low 40s.

My Dad used to do a complicated formula on professional occupations and education level for tennis because you are looking for a more professional mix and

executives. But, when you start getting into these price points, you kind of get into that category anyway. So, there isn't really any magic to this; it is just a function of density and income.

**JC** - What is your initiation fee? How does it vary, and is it ever discounted?

**SS** - They range from **\$0 - \$750**. It depends on the market and where we are in the renovation cycle. We are trying to get to the point where we can keep and maintain a genuine initiation fee. It is very hard to do. We have done it in Chicago but have not successfully done it in other places.

**JC** - What are your membership options/price points?

**SS** - Our average individual dues rate is **\$200 per month**. Average couple is **\$330**, and average family is **\$410**.

**JC** - If you are able to share, system-wide, how many membership accounts do you have, and how many members does that equate to?

**SS** - **Pre-COVID:** 26,000 memberships, 52,000 members.

### The Family Dynamic

**JC** - Having grown up in a family business myself, I must ask: What positives and negatives did you experience being involved in and advancing to run the family business?

**SS** - Do you have brothers and sisters?

**JC** - I do not. I am an only child.

**SS** - Yes, so that makes life much simpler. I had a brother, **Andrew**, who unfortunately died, and I have two sisters. We all grew up thinking we would be in the business, and at some point, my Dad expected it. But, you know, I kind of went my own way to the hotel side of things. My brother did come into the business pretty quickly after school. My sister was in the business for a

while until she had her third child who was born blind, so she quit working to raise him. He has turned out to be excellent; she did a phenomenal job. She and my brother-in-law are unbelievable.

Before I joined the company, I spent some time interviewing people who were in family businesses: my boss at Hyatt (Hyatt is owned by a very wealthy family, and as I was working for one of the family members), all my Dad's friends, my uncle and other people. I did some research, and as you can imagine, I heard some horror stories. So, I sorted through and categorized those horror stories and talked to my Dad about how we could navigate in a way that would avoid or mitigate them as much as possible. My Dad is a very strong-willed guy, but he was incredibly open to listening. This allowed me to join the company.

Of course, it was not all rose petals and perfume; there were some fights. My Dad and I make a great team. He is a brilliant tactician, and I am a good strategist. If you saw us in the office, you might think we were having a huge fight, but really, it is just kind of like a big Jewish family dinner conversation... loud and everyone talking over everyone else, all thinking they are right. So, you would be making a huge mistake to think that we were having a fight that would split us up. We are both big, loud and opinionated, but we are also both very respectful of each other's position and opinions. So, even though I have controlled the company through stock or trusts for probably 20+ years now, I treat it completely as a 50/50 partnership. If my Dad does not want to do something, then I am not going to do it. And, he is the same way with me. He respects me; I respect him, we are both smart and capable, so it works out well. We just don't agree all the time, and because of the complexities of a father-son relationship, there is often more at the table than just the issue at hand.

There were many, many days where I wished I was not working in a family business. Justin, you may feel this, but I do not know... My Dad likes to work all the time. That is just what he does. He does not have any other real hobbies or interests and is never going to retire. He does not want to retire. He is 89. He still comes into the office. I am 61. When I see him on the weekend, he wants to talk business. When I see him at the office, he wants to talk business. If we are at dinner, he wants to talk business. There is no escape. One of the nice things working for Hyatt was that, on the weekends, I did not really have to worry about it. Plus, failure in a family business has its own set of additional problems. So, with the shutdown, I did not want to lose. I do not want the company going down on my watch. But, it has worked out, you know, and God love him, you could not ask for a better partner. You can quote me on that: *You could not ask for a better partner.*

(See *The Schwartz Family* Page 17)



"Theater" at Midtown Athletic Club Bannockburn

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## ***...The Schwartz Family***

continued from page 16

**JC** - What lessons did you learn from working with your Dad, and how did it affect how you and your son, Alex, interacted in the business?

**SS** - First of all, one of the things I learned is that working for other people first is a really good idea because it gives you the chance to make mistakes and learn without having the whole family dynamic. Second, you have the opportunity to get success on your own. A family business can tear you down. Third, you have an opportunity to learn from people whom you otherwise would never have had the opportunity to learn from.

With Alex, I was not sure he ever really wanted to come into the family business, but my Dad wanted him to come in right away. I wanted him to go out on his own and decide what he wanted to do. I only wanted him to come here if he wanted to come here, and that was a little hard for my Dad to accept. I did not want him to feel forced or guilted into coming in. I wanted him to find success and be happy.

Fortunately, Alex had a wildly successful career in advertising before he joined Midtown. Advertising is a crazy business, but he is very talented. The

relationship evolved. We were looking for a new ad agency. We had a New York agency that was good, but it was getting expensive and I did not really love their campaigns. Alex wanted to go out on his own, and because we needed a new agency anyway, I told him, 'We will be your first client. We will put you on retainer.' Doing so saved us money, and we got a much better result than we would have by hiring another firm.

We did that for about a year or two. Then, we started a search for a new *Director of Marketing*, and he said he would like to do the job. So, really, in the end, he came to us. We needed him, and he has been a terrific addition. He doesn't report to me. He reports to **Jon Brady**, our *President*, so we respect the distance. It has worked out well. Truthfully, I would like to work with him more (and I know my Dad wants to work with him a lot more!).

**JC** - That is great! I am glad to hear that.

### **50 Years and Beyond**

**JC** - What's on the horizon for Midtown? Any future plans for new clubs?

**SS** - When we get through this thing (COVID), I am expecting that our business will come back. It may not come back 100%, but if it comes back 80 - 90%, we will be fine

and generating enough cash so that, after a short period of recovery time, we will grow. We will continue upgrading all of our clubs to be just like the Chicago standard, and then, we are going to be on the lookout for new places. As I mentioned earlier, I think the opportunistic background got us to the point where I wanted to be more strategic, but the opportunistic background will serve us well because there are going to be a lot of opportunities when this is over.

**JC** - To close this incredibly informative interview, once again, congratulations on 50 years! What a truly great achievement. Given COVID restrictions, how did you celebrate this? Any plans for a larger celebration in the future?

**SS** - We did not celebrate, but we did inform our members. We just can't celebrate right now, but we did tell everyone we are going to celebrate next year when 51 will be the new 50.

■ ■ ■

**Publisher's Note:** What a family. What a business! For space requirements, some sections were cut from this story. To view the full, original story, go to [www.clubinsideronline.com/archives](http://www.clubinsideronline.com/archives).

*(Justin Cates is the Publisher of Club Insider. Having been born into a club business family in 1985, Justin grew up in the health and fitness club industry. He has lived and breathed this industry for 40 years, since his own day one, and he loves it dearly. Graduating from the Terry College of Business at The University of Georgia in 2007, Justin has run day-to-day operations of Club Insider for 15+ years. Justin became Publisher of Club Insider in April of 2020. Justin's Dad, Norm Cates, continues to serve as Founder and Tribal Leader Since 1993. You can reach Justin by phone at 863-999-2677 or email at [Justin@clubinsideronline.com](mailto:Justin@clubinsideronline.com).)*

*(Norm Cates, Jr. is a 50+ year veteran of the health, racquet and sportsclub industry. He is the Founder and Tribal Leader Since 1993 of Club Insider, now in its 32nd year of monthly publication. In 1981, he was IHRSA's First President, and a Co-Founder of the Association with Rick Caro and five others. In 2001, he was honored by IHRSA with its DALE DIBBLE Distinguished Service Award, one of its highest honors. And, in 2017, he was honored with Club Industry's Lifetime Achievement Award. You can reach Norm by phone at 770-635-7578 or email at [Norm@clubinsideronline.com](mailto:Norm@clubinsideronline.com).)*

# The REX Leadership Academy

By: Eddie Tock

The health and fitness industry is set to witness a transformative event with the introduction of the *REX Leadership Academy*, scheduled for July 15 - 17, 2025, at the Crotonville Conference Centre in Ossining, New York. This immersive, two-and-a-half-day program is meticulously designed to equip industry leaders with the skills and insights necessary to navigate the evolving landscape of health and fitness management.

## Revitalizing Leadership Training in the Industry

Historically, IHRSA offered similar Leadership Institutes aimed at enhancing the competencies of health club executives. However, with the discontinuation of such programs, a noticeable void emerged in the industry. Recognizing this gap, *REX Roundtables* has taken the initiative to revitalize and elevate leadership training through the REX Leadership Academy. This endeavor aligns with REX's commitment to fostering continuous improvement and excellence within the health and fitness sector.

## A Comprehensive Curriculum for Diverse Roles

The academy's curriculum is tailored to address the multifaceted challenges faced by professionals in the health and fitness industry. It is particularly beneficial for:

- **Club or Studio Owners:** Strategies to enhance business operations, boost member retention and drive profitability.
- **Club or Studio Managers:** Leadership techniques to inspire teams, streamline operations and achieve organizational goals.
- **Spa Owners or Managers:** Gain specialized insights on enhancing client experience, optimizing operational efficiency and driving profitability within the spa and wellness sector.
- **Department Managers:** Skills to lead departments effectively and contribute to overarching business success.
- **Aspiring Business Leaders:** Fundamental leadership principles to accelerate career progression in the industry.

Key topics encompass Sales, Marketing & Personal Training; Leadership & Strategy; Culture & Customer Experience; Operations & Programming; Networking & One-on-One Sessions; and Financial Management.

## REX Faculty and Guest Speakers

The REX Leadership Academy boasts a distinguished lineup of faculty and guest speakers, each bringing a wealth of experience and expertise:

- **Eddie Tock:** Host & REX CEO, renowned for his strategic insights in the fitness industry.
- **Allison Flatley:** REX Chair, celebrated for her leadership in health club management.
- **Brent Darden:** REX Chair, former IHRSA interim President & CEO, with extensive industry knowledge.
- **Justin Tamsett:** REX Chair, an international speaker known for his expertise in member engagement.
- **Frank Ancharski:** REX Chair, specializing in operational excellence and customer experience.
- **Mary Laudati:** REX Chair, with a focus on marketing and sales.
- **Dan Duran:** REX Chair, Personal Training Manager Roundtable and VP of Lionel University Global.
- **Mark Miller:** REX Chair, recognized for his work in organizational culture and leadership.
- **Danielle Krischik:** Keynote Speaker, Partner, Chief Strategy Officer at Knight Agency, offering expertise in strategic marketing.
- **Frank Lawrence:** CEO of Little Rock Athletic Centers, bringing financial insights from club operations.
- **Mark Harrington Jr.:** President of Healthworks Fitness, Gymfit, and Republic Fitness, known for innovative business strategies.
- **Lesley Carr:** VP of Fitness at Healthworks and Republic Fitness, with a focus on

fitness programming and leadership.

These industry luminaries will share their knowledge through keynote speeches, interactive sessions and panel discussions, providing attendees with actionable strategies and a comprehensive understanding of effective leadership in the health and fitness domain.

**An Engaging and Interactive Agenda:** The academy's agenda is structured to maximize learning and networking opportunities: [rexleadershipacademy.com/#agenda](http://rexleadershipacademy.com/#agenda). Optional guided tours of clubs and studios in New York City are available on July 17 - 18, offering practical insights into successful operations.



Eddie Tock

**A Commitment to Building a Leadership Community:** Beyond the structured sessions, the REX Leadership Academy emphasizes the creation of a supportive community among participants. The academy fosters an environment of honesty and openness, encouraging attendees to share experiences, challenges, and solutions. This collaborative approach ensures that the learning extends beyond the event, providing ongoing support and networking opportunities.

**Limited Enrollment for Personalized Experience:** To maintain an intimate and interactive setting, enrollment is capped at 80 attendees. This limitation ensures personalized attention and fosters meaningful connections among participants and faculty. Prospective attendees are encouraged to secure their spots promptly to benefit from this unparalleled leadership

development opportunity.

## Conclusion

The REX Leadership Academy represents a pivotal moment for leadership development in the health and fitness industry. By bridging the gap left by previous programs, it offers a comprehensive, immersive experience designed to empower current and aspiring leaders. With its robust curriculum, esteemed faculty, and commitment to community building, the academy is poised to set a new standard for excellence in industry leadership training. For more information and to register, visit the official REX Leadership Academy website at [rexleadershipacademy.com](http://rexleadershipacademy.com) or contact Eddie Tock by email at [eddie@rexroundtables.com](mailto:eddie@rexroundtables.com) or phone at (914) 643 - 3207.

## REX Roundtable Founder Will Phillips Passes Away

**NEW YORK, N.Y.** - It's with a heavy heart that we share the passing of **Will Phillips**, Founder of *REX Roundtables*. Will passed peacefully last week, surrounded by his family, after complications from surgery.

There are very few people in the global fitness industry who have had the widespread and lasting impact that Will had over his 30+ years of service. His influence touched thousands of lives and transformed countless businesses.

"In simple terms, if there was no Will Phillips, there would be no REX Roundtables," said Eddie Tock, CEO of REX. "What Will initiated back in 1989 has grown to over 350 members and 400 REX Roundtable meetings across the United States, Australia and Europe per year. That's an extraordinary legacy."

Will officially retired in May 2020, having led over 2,800 working sessions and corporate retreats with top fitness industry

leaders. He was a regular presenter on the global stage and authored more than 400 Management Briefings for health club executives.

When he stepped away, industry icon Joe Cirulli said, "I've always thought of Will as having my own personal Obi-Wan Kenobi."

Blair McHaney from MXMetrics shared, "Because of Will, my life is better, my family's life is better, and all of our employees' lives are better."

Brent Darden, REX Chair and former Roundtable Member, added, "Will had an indelible and long-lasting influence on the fitness industry."



The late Will Phillips

His memorial service will be June 14 with details to be announced.

# Harnessing Data for the Ultimate Health Club Design: A Modern Approach to New Builds and Renovations

By: Bruce Carter

The health and fitness industry has evolved significantly, with more people now focused on overall wellbeing, which has led to new approaches to club design for health clubs and wellness centers. The design of these spaces can directly influence user engagement, satisfaction and overall success.

With technology improving every day, incorporating data has become critical for creating efficient, effective and member-centric health club spaces. Data informs design decisions to optimize space usage, enhance the member experience, control construction costs and streamline operations.

You will find that there is an abundance of data available when you take the time to look. These include Google Search, AI such as *Perplexity.ai*, contacting known club owners, equipment vendors and studying other clubs and the competition. Watch what large, successful chains are doing. They are learning from experience; what's working, what is not. Gym management software companies publish data on tracking usage, peak hours, preferred equipment, and popular classes. Associations and organizations often publish information on trends, including the *Health & Fitness Association (HFA)*, *American Council on Exercise (ACE)*, *American College of Sports Medicine (ACSM)* and *Idea Health and Fitness Association* and their publications.

## A key area of important data is knowing the evolving trends in health clubs and club design.

One area affecting design is post-pandemic considerations, which the COVID-19 pandemic led to a shift in fitness preferences, from crowded gyms to more spacious and flexible environments that can accommodate more desired social distancing.

Relevant data can show how to use design to enhance a user's experience. Using data about member flow, usage patterns and peak times, design can optimize the layout to reduce overcrowding, bottlenecks and create a smooth user experience. Personalization of the user experience through custom training areas or zones based on data about specific fitness goals can boost member satisfaction.

As it is becoming widely known, there is an increasing emphasis on wellness and multi-use spaces. Modern gyms are not just for working out; they serve as holistic wellness and social hubs that include areas for relaxation, meditation, nutrition and recovery (e.g., cryotherapy, red light, massage units, saunas, wellness zones).

Extremely important is the focus on aesthetic appeal and comfort. Lighting, colors, finishes, acoustics and ambiance are all part of the user experience. An inviting and inspiring environment profoundly affects sales and retention. Data on user preferences (such as lighting intensity and sound levels during different activities) can guide decisions to make the space more inviting. Additional design elements like open layouts or intuitive signage create a more comfortable and welcoming environment.

Other important areas of data for either new builds or renovations include member demographics and behavior, such as age, income, education levels, fitness levels, goals and activity preferences that help dictate the design of workout areas, class spaces and amenities.

Customer feedback and satisfaction metrics, including regular surveys and feedback, can highlight design flaws or areas for improvement, like poorly placed equipment or inadequate locker room facilities. Data on energy consumption, air quality and natural light exposure helps make the club eco-friendly and cost-effective. This can result in designing energy-efficient HVAC systems, LED lighting and water-saving fixtures.

## Equipment selection and layout are among the more challenging decisions that affect design.

Data on the most popular equipment types (e.g., cardio machines, free weights, resistance training) and emerging trends (e.g., functional training areas, mobility tools) can inform purchasing decisions. It is interesting to note that research has shown that, when sensors are placed on equipment to acquire data on what gets used, the usage most often differs from what club management might assume.

Key trends include an increasing emphasis on free weights and plate-loaded equipment, and less emphasis on cardio, with the demand for selectorized equipment remaining constant. Functional training areas are key, but more for personal use than class-type offerings. Simplicity and ease of use remain a key demand for equipment.

Prioritizing what equipment to select is often affected by space availability and member demand. When you have a better understanding of what equipment is in demand and the space available, the data can then allow for prioritizing of what to purchase. This will lead to easy movement between different workout areas, preventing congestion, safe distances between machines, optimal use of the equipment and accessibility for all

users, including those with disabilities.

Data can show demand leading a club design to consider flexible spaces that can accommodate a range of activities, from HIIT to yoga, based on the diverse needs of members. For example, sports vinyl flooring can accommodate weight usage as well as for classes. Lighting options such as colored lighting and all lighting on dimmers can provide different environments in the same space.

## Here are some key do's and don'ts to focus on.

When possible, do collect and analyze member data regularly. If this is not available with a current club, this information is available in the areas of data availability mentioned previously.

Integrate technology thoughtfully, including incorporating fitness tracking systems, digital wall monitors, mobile apps, or smart equipment to enhance the member experience, making it interactive and personalized.

Do focus on flexibility and adaptability, ensuring that the design can be adjusted as trends change and member needs evolve. Spaces for group workouts should be designed with easy adaptability in mind.

Focus on changing trends in interior design, such as lighting, colors and finishes. Keep in mind, the environment needs to be energizing yet non-intimidating. However, keep in mind that certain current design trends, such as dark rooms: black walls, floors and ceilings with LED lighting may or may not appeal to your target markets.

Do prioritize safety and comfort, paying attention to details like ventilation, temperature control, lighting and acoustics to create a comfortable, injury-free environment for users.

Don't overcrowd the space and avoid placing too much equipment too closely together. Data can show where



Bruce Carter

space is underutilized, allowing you to adjust accordingly.

Don't overlook member feedback or fail to research what other clubs have learned from their membership feedback.

Don't underestimate the importance of community spaces because many members join health clubs not just for the workout but for the social experience. Creating areas where people can relax, socialize and network is a key aspect of health club success.

Incorporating data into the design of a health club is not just a passing trend; it's a strategic approach that can lead to enhanced member satisfaction, improved operational efficiency and long-term success. By understanding member preferences, optimizing space, personalizing experiences and adapting to trends, health clubs can create a dynamic, attractive and efficient environment. Data isn't just about numbers; it's about building a space that works for both the business and the members.

(Bruce Carter is the owner of Optimal Design Systems, International. Bruce can be reached at [bruce@optimaldsi.com](mailto:bruce@optimaldsi.com).)

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# The Intersection of Fitness, Finance and Behavior

## *Q&A with Investor, Jim Crowell, Founder of SageHouse Advisors and Capital*

By: Nancy Trent

As the owner of *SageHouse Advisors* and *SageHouse Capital*, **Jim Crowell** is a highly sought-after investor and advisor specializing in scaling fitness and wellness companies. *SageHouse* is a hybrid consulting-investing firm that builds long-term foundations for sustainable success, working closely with purpose-driven start-ups on a mission to change the world. By combining investing and consulting, Crowell and his team help companies structure for growth, improve products and customer experiences, and strengthen sales and marketing infrastructure to scale faster.

Crowell's extensive background in the fitness industry includes serving as *CEO* of *OPEX Fitness*, *Co-Founder* of *proof3.com*, which is a gym, online coaching and technology company in the fitness space, advising and educating fitness and fitness technology businesses for over 15 years, owning and successfully exiting multiple gyms, as well as a prior career as an energy hedge fund trader. His well-rounded experience makes him an insightful resource for understanding what investors look for in fitness and wellness brands.

In this conversation, Crowell shares his thoughts on what makes companies stand out, the trends shaping the industry, and how businesses can position themselves for success in a rapidly evolving market.

**Nancy Trent (NT)** - What kind of companies do you look to invest in?  
**Jim Crowell (JC)** - We invest entirely in fitness and wellness companies. We've dabbled in pure health, but our primary focus is on the fitness and wellness side. We've invested in software and tech platforms, hardware companies, gym and sports facility management businesses, nutrition brands and even a smart shoe company, among others.

**NT** - What makes a company attractive to you?  
**JC** - That's a big question. I've spent years building and refining a decision-making process to filter companies quickly and remove behavioral biases from our investment decisions. We look at several key factors:

**People:** We're looking for outliers who combine vision with world-class execution. They need to have a deep passion for their idea and the grit to push through when things get tough.

**Competitive Advantage:** We analyze whether a company can achieve market

dominance and whether it has a unique edge that sets it apart.

**Innovative Business Models:** We value models that break new ground while demonstrating clear, sustainable growth potential.

**Market Opportunity:** The market should be large enough for significant impact but not so competitive that it becomes impossible to break through. New or niche markets often provide exciting opportunities.

**Belief in the Product:** We want to believe in the product: its mission, impact and value to its audience.

**Customer Understanding:** Founders need to be true experts on their audience. Knowing who you're serving and how to engage them effectively is crucial.

**An idea of the risk involved:** The higher the potential return and the lower the risk, all things equal the more we'd want to invest.

**NT** - What turns you off about a company?

**JC** - A lack of openness to other perspectives is a big one. I appreciate when founders listen to different opinions, analyze the information and then make their own decisions. Slow, low-quality execution is another red flag, as is neglecting the wellbeing of their customers and team. If a company doesn't understand its market, that's a deal-breaker, too. New founders don't get a free pass; they need to learn fast, never stop learning and run through many brick walls with their grit, resilience and work ethic.

**NT** - What interests you most about the wellness sector?

**JC** - It's one of the few industries where people often enter out of pure passion and a genuine desire to help others. Yes, there are some snake oil salespeople out there, but many brands are saving and extending lives in meaningful, cost-effective ways. Plus, the sector is a lot friendlier than many other industries. Most people genuinely get along even though, as companies grow, it can get a bit feisty. I've been in this space for a long time, and I love the continuous learning and pursuit of mastery it offers.

**NT** - Any tips for sprucing up an investor deck?

**JC** - Yes, several:

**Know your audience:** Tailor your pitch based on who you're presenting to.

**Sell your vision, not just your product:** Make sure you can connect the dots from where you are today to the big picture.

**Anticipate questions:** Think through what potential investors might ask and have clear, concise answers ready.



Nancy Trent



Jim Crowell

**Keep it short:** You often only get 30 to 120 seconds to capture attention. Make every second count.

**Do your homework:** Understand what has worked, what hasn't and how you plan to use new resources effectively.

**NT** - What makes you perk up in an elevator pitch?

**JC** - I love when someone shows a deep, data-backed understanding of their audience, product and market. Traction helps, too. If you can demonstrate early momentum, it makes me pay attention.

**NT** - What trends have you been spotting?

**JC** - Digital experiences are finally living up to the hype. Apps and hardware from companies like *Oura* and *Tonal* have become so good that the mainstream is giving them a try. Strength training and Pilates remains huge, and improved technology is helping gyms enhance their member experiences.

Longevity clinics are popping up everywhere; we might see one on every corner soon. Most won't deliver on their promises, but a few will be gamechangers. Experiential wellness, like what *Othership* is doing, continues to grow, and sports-based activities are on the rise because people crave connection and play. GLP-1 medications are another trend to watch; the next wave of these drugs is going to surprise people.

**NT** - What do you predict for the future of wellness?

**JC** - Unfortunately, we're likely to see a growing divide in wellness access. The "haves" will live longer, healthier lives, while the "have-nots" will continue to struggle with health issues due to limited access to quality services. There are promising startups trying to change this, but affordability remains a challenge.

**NT** - What changes should brands make in this time of transition?

**JC** - It always comes back to knowing your audience. The best brands deeply understand their customers and serve them with authenticity. During times of uncertainty, fear often increases, so companies need to be supportive, empathetic and provide clear leadership to reassure and retain their community.

**NT** - Has your sports training impacted how you invest?

**JC** - Definitely. Sports taught me the value of growth and improvement. I'm less interested in competition itself and more focused on the process of learning, refining and getting better over time.

**NT** - Tell me about your hedgehog philosophy.

**JC** - In this context, hedgehogs are founders who aren't chasing quick wins. They're deeply committed to understanding their process and continually improving over many years. Those are the people we want to partner with. The great team over at *Altos* talk often about this belief too. I also have a personal passion for the intersection of fitness, finance and behavior. It's a fascinating space where each element influences the others in powerful ways.

▪ ▪ ▪

Jim Crowell's insights reveal the dynamic, opportunity-rich nature of the fitness and wellness industry. His focus on adaptability, innovation and customer-centric strategies provides a valuable playbook for entrepreneurs navigating the path to long-term success.

(Nancy Trent is the Founder and President of Trent & Company, a leading wellness PR firm. Contact Nancy at [nancy@trentandcompany.com](mailto:nancy@trentandcompany.com).)

# The Benefits of Benefit Selling

By: Jeffrey Pinkerton

"People don't want to buy a mattress. What people want is a good night's sleep." Similarly, while membership numbers are moving in the right direction, the majority of people don't want to buy a gym membership. What most people want is to move better and feel better. And, we all know that belonging to a gym, especially one that provides connection and community and support and accountability, is the ideal way to stay motivated and encouraged to keep moving. But, does your marketing message match; does it sell benefits? Or, are you still featuring all the features and promoting the promotions?

## People Don't Want to Buy a Mattress

In the *Medium* article (see [bit.ly/clubinsider163](http://bit.ly/clubinsider163)) that introduces the idea of selling a mattress vs. selling a good night's sleep, author **Miguel Ferreira** also references Apple's marketing strategy for the first iPod. Did they sell the features? 5GBs, a disk wheel for navigation, headphones included? No. They marketed the benefits of the new device: "1,000 songs in your pocket." In your marketing, are you featuring the features? (New machines, massage chairs, lots of classes!) Or promoting the latest price promotion? (\$0 enrollment!) Or are you selling the benefits? (*Move well in real life, live longer, connect with people, improve strength and confidence,*

avoid injury... we could go on and on.)

## People Don't Want to Buy a Plane Flight

Imagine if *Delta Airlines* focused their marketing on features. Their website might list gate areas with seats, boarding via covered jetway, modern interior with blue decorative lighting, state-of-the-art engines (I hope so!), and drink service with mini-snacks (turbulence permitting).

Things get worse if they choose to be completely truthful in their marketing message – just enough leg room for a small-sized person, minimally reclining seats and room overhead for just one bag (if you board early enough).

And, the marketing gets laughable  
(See **Jeffrey Pinkerton** Page 22)



Jeffrey Pinkerton

# Why Most Gyms Fail at Retention and How to Fix It in 30 Days

By: Jim Thomas

Retention is the lifeblood of a successful gym business. Yet, most independent gym owners, boutique studio operators and fitness entrepreneurs find themselves fighting an uphill battle to keep members engaged, loyal and referring others. They spend money and effort on lead generation and new sales, only to see members walk out the back door, often without saying a word.

Let's be clear: **You don't have a marketing problem; you have a retention problem.** And, it's fixable. In fact, with the right focus and a 30-day plan, you can start turning things around fast.

## Why Most Gyms Fail at Retention

Before we get into the fix, let's identify the most common retention killers:

**Lack of Relationship with Members:** People leave people, not places. If your team doesn't make personal connections, members won't feel missed when they stop showing up.

**No Accountability or Progress Tracking:** If members don't see results, or don't realize they're making progress, they lose motivation and stop coming.

**Boring or Stagnant Programming:** Repetitive classes or lack of variety can make workouts feel like a chore. People crave energy, variety, and challenge.

**Lack of Recognition:** Members want to feel seen and celebrated. If no one notices their effort, they'll eventually wonder why they bother.

**Untrained or Disengaged Staff:** A front desk that doesn't greet by name, trainers who don't check in or instructors who don't

care kill culture fast.

■ **No Clear Community or Culture:** If your gym is just a building with equipment or a schedule of classes, you're replaceable. If it's a community, you're irreplaceable.  
■ **No Follow-Up System for At-Risk Members:** If someone stops showing up, does anyone notice? And, more importantly, does anyone reach out?

## The 30-Day Retention Fix Plan

Here's a simple but powerful plan to dramatically boost retention and referrals in just 30 days.

### WEEK 1: Reconnect and Reignite:

■ **Hold a 60-minute Team Meeting:** Train your staff to prioritize member relationships above all. Discuss names, backstories, goals, and what each member needs from the experience.

■ **Create a Member Love List:** Identify your Top 25 most loyal members and your Top 25 most at-risk (haven't visited in 10+ days). Send a personalized text, call or video message to each. Make it personal.  
■ **Implement a 3-Touch Rule:** Every member should be greeted by name, encouraged during their workout and acknowledged on exit... every visit.

### WEEK 2: Build an Accountability Engine:

■ **Offer Free Progress Check-Ins:** Run 15-minute body comp, goal setting or fitness assessments. This keeps members focused and reminds them why they joined.  
■ **Assign an Accountability Coach:** It doesn't have to be a trainer. Give each member a go-to person who checks in weekly.  
■ **Launch a Challenge or Transformation**

**Group:** Keep it simple and results-focused. Community + progress = stickiness.

### WEEK 3: Spark Community/Recognition:

■ **Start a "Member of the Week" or "Transformation Tuesday:"** Feature it on your wall, socials and in your newsletter.  
■ **Run a Low-Cost, High-Connection Event:** Potluck. Group hike. Charity bootcamp. Member birthday bash. Just give people a reason to gather.  
■ **Introduce Referral Recognition:** Anyone who brings in a guest gets a thank-you shoutout and gift (Bonus points if they bring them to an event).

### WEEK 4: Lock in Loyalty/Multiply Referrals:

■ **Create a Welcome Back Campaign:** Identify lapsed members from the past six months. Send a "we miss you" offer and personally follow up.  
■ **Launch a "Bring a Friend Free Week:"** Let members show off your gym. Create a "thank you" reward for both parties if the friend joins.  
■ **Ask the Magic Question:** After a workout, ask top members: "Hey, who's one person you think would love this gym like you do?" That opens the door for more referrals and shows that you value their influence.

### Additional Retention Boosters You Can Layer In:

■ **Handwritten Thank You Cards** for every milestone (1 month, 6 months, 1 year).  
■ **Automated Text Reminders** for missed sessions.  
■ **Monthly Goal Review Emails** personalized to each member.  
■ **Exclusive Members-Only Events** (even if



Jim Thomas

just on Zoom).  
■ **Facility Improvements Based on Feedback;** even small ones show you care.

### Final Word: Retention is Culture, Not Strategy

You don't fix retention with gimmicks. You fix it by becoming a gym people never want to leave. That means investing in your members emotionally, mentally and socially, not just physically. Make retention a daily focus. Ask yourself and your team every morning: *"What are we doing today to make sure every member knows they matter?"* Because when they feel that, you don't just keep them, they bring everyone they know.

(An Outsourced CEO, Turnaround Expert and Author, Jim Thomas is the Founder and President of FMC USA Inc. Learn more at [www.fmconsulting.net](http://www.fmconsulting.net) or [www.youtube.com/gymconsultant](http://www.youtube.com/gymconsultant).)

## ...Jeffrey Pinkerton

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if they were to try to sell the actual experience of it all – you'll face delays and lines, you'll breathe recycled air for hours, you may have a screaming child next to you, there is no dress code, no personal hygiene protocol, you'll be sitting for 2 - 10+ hours, and you can only get up sometimes to use the restroom.

If Delta only marketed the features, no one would fly.

### What People Want is a Vacation

If you've seen a Delta commercial, *you know they wisely market the destination.* They sell the reunion of family members, the joy of sharing life with people you love, the thrill of finding new adventures, meeting new people and exploring new places. They sell the benefits of flying.

### What People Want is to Feel Better

Most people – present company likely excepted – don't want to exercise. Right, even with the state-of-the-art-est

machines and \$0 down. But, what they want and need – and what you have to sell – are the benefits of regular exercise, things like motivation, accountability, friendships, coordination and confidence, an extended healthspan, improved Movement Health, and – is this a coincidence? – even a good night's sleep.

■ ■ ■

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*(Jeffrey Pinkerton is the Business Development Manager for MOSSA. Jeffrey can be reached by phone at 770-989-4737 or email at [jeffreypinkerton@mossa.net](mailto:jeffreypinkerton@mossa.net).)*

## Bay Club Acquires Harbor Square

**SAN FRANCISCO, CA** - The Bay Club Company ("Bay Club") has announced the strategic acquisition of Harbor Square Athletic Club, a premier fitness, tennis and swim club located just north of Seattle in Edmonds, Washington. This is Bay Club's third acquisition in the Pacific Northwest since 2023, marking another significant milestone in the company's ambitious growth trajectory. This acquisition further strengthens Bay Club's Pacific Northwest Campus, following the successful integrations of PRO Club Bellevue and PRO Club Seattle, and underscores the company's unique community-driven approach to active lifestyle offerings.

With its Pacific Northwest Region now featuring four clubs, the company continues to strategically expand its presence across the West Coast, building 12 interconnected regional campuses that redefine the sports, outdoor recreation and active lifestyle experience. Bay Club is on track to exceed 50 clubs and over 200,000 members by the end of 2025. This growth is fueled by the company's commitment

to community and their three-pronged playbook: establishing regional campuses, filling them with exceptional sports, family, fitness and hospitality amenities, and evolving their groundbreaking Shared Membership model. This innovative approach recognizes that "family" extends beyond traditional boundaries, encompassing friends, neighbors and colleagues, and allows up to eight people on one membership. Bay Club's technology-enhanced Shared Membership model empowers members to curate their communities, fostering a sense of belonging and connection.

Bay Club's expansion continues to shape the future of the industry, offering members unparalleled access to regional campuses that foster engagement, wellbeing and shared experiences. As the company eyes new markets in the mountain and desert regions, its focus remains on delivering vibrant, connected communities that go beyond traditional fitness clubs.

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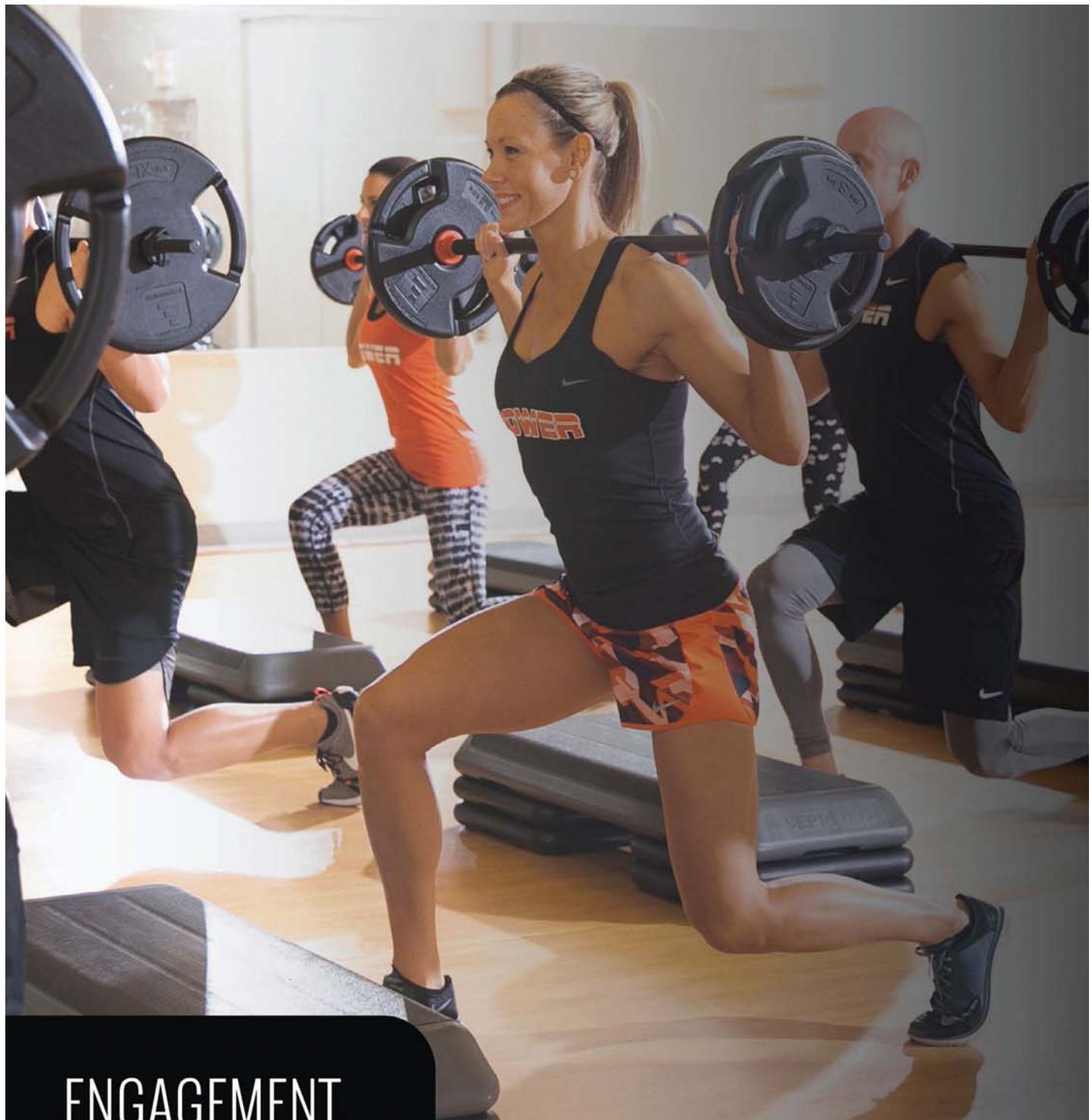


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