

Report Price: £1995.00 | \$2693.85 | €2245.17

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.



"Operators need to embrace technology but remember that this is no substitute for personal interaction. Personal trainers and gym staff are a brand's strongest asset. Affordability of personal training can be addressed, while using online channels to build rapport with customers can help overcome barriers to interaction."

- Helen Fricker, Associate Director - Leisure

# This report looks at the following areas:

- How can operators encourage members to seek advice and support in person?
- How can operators compete with online exercise sources?

The private health and fitness market is in steady growth with 15% of Brits now having a membership. Low-cost operators continue to expand at pace while a rise in use of the franchise model is also fuelling an increase in site numbers.

Technology is improving retention and acquisition. It is allowing operators to understand customers better and also offer more immersive ways of exercising. However, it is also making at-home workouts more available as online and on-demand exercise channels evolve.

Operators need to embrace technology but remember that this is no substitute for personal interaction. Personal trainers and gym staff are a brand's strongest asset. Affordability of personal training can be addressed while using online channels to build rapport with customers can help overcome barriers to interaction.

# BUY THIS REPORT NOW

**VISIT:** store.mintel.com

**CALL:**EMEA
+44 (0) 20 7606 4533

Brazil 0800 095 9094

Americas +1 (312) 943 5250

+86 (21) 6032 7300

APAC +61 (0) 2 8284 8100

**EMAIL:** reports@mintel.com

**DID YOU KNOW?** 

This report is part of a series of reports, produced to provide you with a more holistic view of this market



Report Price: £1995.00 | \$2693.85 | €2245.17

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

#### **Table of Contents**

#### **Overview**

What you need to know

Products covered in this Report

#### **Executive Summary**

#### The market

#### Private health and fitness market valued at £3.2 billion

Figure 1: Value of the UK private health and fitness club market, 2013-23

Figure 2: Volume of the UK private health and fitness club market, 2013-23

#### Low-cost and franchise expansion

High street closures are fuelling gym openings

Companies and brands

#### PureGym reaches 200 sites and a million members

Figure 3: Leading private health and fitness club operators, by number of sites, June 2018

#### The consumer

#### Online workouts more common than classes

Figure 4: Participation in health and fitness activities, May 2018

# Rise in gym usage and steep drop in rejection

Figure 5: Private health and fitness club usage and consideration, April 2014 - May 2018

# Multiple gym memberships not uncommon

Figure 6: Number of health and fitness clubs used, May 2018

### One in ten visits daily and nearly half go at weekends

Figure 7: Frequency of health and fitness club visits, May 2018

Figure 8: Day of health and fitness club visits, by gender, May 2018  $\,$ 

#### Predictable peak times

Figure 9: Time and day of health and fitness club visits, May 2018

# Majority pay below £40 for membership

Figure 10: Current, previous and potential health and fitness club membership fees, May 2018

# Affordable personal training sought and half expect online to be same standard as in-person

Figure 11: Attitudes towards online and in-person health and fitness interactions, May 2018

# Opportunity for medical and wellness incorporation, while a third expect virtual classes

Figure 12: Attitudes towards health and fitness club developments, May 2018

# Location more of a driver than price while group setting and tech can encourage visits

Figure 13: Attitudes towards drivers of health and fitness club usage, May 2018  $\,$ 

# Drop in competition from gym alternatives but over a third have considered cancelling

Figure 14: Attitudes towards health and fitness clubs and membership, May 2018

What we think

**Issues and Insights** 

BUY THIS REPORT NOW

VISIT: store.mintel.com

**CALL:** EMEA +44 (0) 20 7606 4533 | Brazil 0800 095 9094 Americas +1 (312) 943 5250 | China +86 (21) 6032 7300

APAC +61 (0) 2 8284 8100

EMAIL: reports@mintel.com



Report Price: £1995.00 | \$2693.85 | €2245.17

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

How can operators encourage members to seek advice and support in person?

The facts

The implications

How can operators compete with online exercise sources?

The facts

The implications

#### The Market - What You Need to Know

Private health and fitness market valued at £3.2 billion

Increase in gym visits and intentions to spend on leisure

Low-cost and franchise expansion

Boutique offerings

High street closures are fuelling gym openings

The growth of online content

Wearable technology and apps

#### **Market Size and Forecast**

#### Private health and fitness market valued at £3.2 billion

Figure 15: Value of the UK private health and fitness club market, 2013-23

Figure 16: Value of the UK private health and fitness club market, 2013-23

# Member numbers set to reach six billion by 2020

Figure 17: Volume of the UK private health and fitness club market, 2013-23

Figure 18: Volume of the UK private health and fitness club market, 2013-23

#### Forecast methodology

# **Market Segmentation**

# Membership fees dominate revenue

Figure 19: Consumer spending in private health and fitness clubs, 2014-18

#### **Market Drivers**

Increase in gym visits and intentions to spend on leisure

Low cost and franchise expansion

Boutique offerings

High street closures are fuelling gym openings

Changing exercise trends

The growth of online content

Wearable technology and apps

# Companies and Brands - What You Need to Know

PureGym reaches 1 million members and 200 sites

Smaller brands taking foothold

Wellness movement

Methods to aid retention and acquisition

BUY THIS REPORT NOW

VISIT: store.mintel.com

**CALL:** EMEA +44 (0) 20 7606 4533 | Brazil 0800 095 9094 Americas +1 (312) 943 5250 | China +86 (21) 6032 7300

APAC +61 (0) 2 8284 8100

**EMAIL:** reports@mintel.com



Report Price: £1995.00 | \$2693.85 | €2245.17

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

Exercise to prevent and treat injury and illness

Boutiques expanding fast

Moving away from the treadmill

The future of fitness focuses on tech and the environment

Making exercise more accessible

Celebs and influencers

Wearable and apps

# **Key players**

#### PureGvm

Figure 20: PureGym estimated site numbers, member numbers, revenue, region, offer and outlook, May 2018

#### Anytime Fitness

Figure 21: Anytime Fitness estimated site numbers, member numbers, revenue, region, offer and outlook, May 2018

#### DW Fitness First

Figure 22: DW Fitness First estimated site numbers, member numbers, revenue, region, offer and outlook, May 2018

#### The Gym Group

Figure 23: The Gym Group estimated site numbers, member numbers, revenue, region, offer and outlook, May 2018

#### Nuffield Health

Figure 24: Nuffield Health estimated site numbers, member numbers, revenue, region, offer and outlook, May 2018

#### David Lloyd Leisure

Figure 25: David Lloyd Leisure estimated site numbers, member numbers, revenue, region, offer and outlook, May 2018

# **Market Share**

#### PureGym reaches 200 sites...

Figure 26: Leading private health and fitness club operators, by number of sites, June 2018

#### ...and a million members

Figure 27: Leading private health and fitness club operators, by estimated membership numbers, June 2018

### Franchise focus

# **Launch Activity and Innovation**

Smaller brands taking foothold

Wellness movement

Methods to aid retention and acquisition

Exercise to prevent and treat injury and illness

Boutiques expanding fast

**UK-based** operators

Overseas operators

Moving away from the treadmill

Boxing

Prama

OCRs and Inflatables

BUY THIS REPORT NOW VISIT: store.mintel.com

**CALL:** EMEA +44 (0) 20 7606 4533 | Brazil 0800 095 9094 Americas +1 (312) 943 5250 | China +86 (21) 6032 7300

APAC +61 (0) 2 8284 8100 | **EMAIL:** reports@mintel.com



Report Price: £1995.00 | \$2693.85 | €2245.17

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

Playground fun

The future of fitness focuses on tech and the environment

Making exercise more accessible

Celebs and influencers

Wearable and apps

#### **Case Studies**

WeGym makes personal training more accessible

Les Mills reports an increase in club licenses

#### **Advertising and Marketing Activity**

#### Nuffield Health increases ad spend

Figure 28: Total above-the line, online display and direct mail advertising expenditure of top 10 health and fitness club advertisers, 2013-17

Sponsorships and Partnerships

Nielsen Ad Intel coverage

#### The Consumer - What You Need to Know

Online workouts more common than classes

Gym users not completely loyal to clubs

Rise in gym usage and steep drop in rejection

One in ten visits daily and nearly half go at weekends

Majority paying below £40 for membership

Two thirds seeking more affordable personal training

Half expect online instruction to be same standard as in-person

Opportunity for medical and wellness incorporation

Location more of a driver than price

### **Health and Fitness Activity Participation**

Online workouts more common than classes

Young women most keen on online workouts

Figure 29: Participation in health and fitness activities, May 2018

Gym users not completely loyal to clubs

Potential gym goers using online workouts

Figure 30: Participation in health and fitness activities, by health and fitness club usage, May 2018

### **Health and Fitness Club Usage**

Rise in gym usage and steep drop in rejection

Figure 31: Private health and fitness club usage and consideration, April 2014 - May 2018

Young men the biggest gym fans but older adults should not be overlooked

Use personalised support to target young women

Figure 32: Private health and fitness club usage and consideration, by age and gender, May 2018

Multiple gym memberships not uncommon

Figure 33: Number of health and fitness clubs used, May 2018

BUY THIS REPORT NOW VISIT: store.mintel.com

CALL: EMEA +44 (0) 20 7606 4533 | Brazil 0800 095 9094

Americas +1 (312) 943 5250 | China +86 (21) 6032 7300 APAC +61 (0) 2 8284 8100 |

**EMAIL:** reports@mintel.com



Report Price: £1995.00 | \$2693.85 | €2245.17

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

#### **Day and Time of Visitation**

#### One in ten members visit daily

Figure 34: Frequency of health and fitness club visits, May 2018

### Half as many people visit at weekends

Figure 35: Day of health and fitness club visits, by gender, May 2018

#### Predictable peak times

Figure 36: Time and day of health and fitness club visits, May 2018

#### **Membership Fees**

# Majority paying below £40 for membership

Figure 37: Current, previous and potential health and fitness club membership fees, May 2018

#### **Attitudes Towards Online and In-person Interaction**

Two thirds seeking more affordable personal training

### Half expect online instruction to be same standard as in-person

Figure 38: Attitudes towards online and in-person health and fitness interactions, May 2018

A fifth shared a workout online

### Young women biggest market for PTs

Figure 39: Agreement with statement I would have or would have more personal training sessions if it was more affordable, by age and gender, May 2018

# **Attitudes Towards Health and Fitness Club Developments**

# Opportunity for medical and wellness incorporation

#### Over a third expect VR and immersive classes in gyms

Figure 40: Attitudes towards health and fitness club developments, May 2018

# **Drivers of Use of Health and Fitness Clubs**

#### Location more of a driver than price

# CHAID analysis

Figure 41: Health and fitness clubs - CHAID - Tree output, May 2018

# Majority more likely to visit with others, especially young women

### Technology is a driver for many

Figure 42: Attitudes towards drivers of health and fitness club usage, May 2018

### **Threats to Health and Fitness Clubs**

#### A fifth don't feel valued

Drop in competition from gym alternatives...

#### ...but over a third have considered cancelling

Figure 43: Attitudes towards health and fitness clubs and membership, May 2018

# **Appendix - Data Sources, Abbreviations and Supporting Information**

Abbreviations

Consumer research methodology

CHAID methodology

BUY THIS REPORT NOW VISIT: store.mintel.com

**CALL:** EMEA +44 (0) 20 7606 4533 | Brazil 0800 095 9094 Americas +1 (312) 943 5250 | China +86 (21) 6032 7300

APAC +61 (0) 2 8284 8100 | **EMAIL:** reports@mintel.com



Report Price: £1995.00 | \$2693.85 | €2245.17

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

Figure 44: Health and fitness clubs - CHAID - Table output, May 2018

#### **Appendix - Market Size and Forecast**

#### Market value

Figure 45: Forecast of consumer expenditure on private health and fitness clubs, 2018-23

#### Market volume

Figure 46: Forecast of private health and fitness club user numbers, 2018-23

Forecast methodology

**VISIT:** store.mintel.com

**CALL:** EMEA +44 (0) 20 7606 4533 | Brazil 0800 095 9094 Americas +1 (312) 943 5250 | China +86 (21) 6032 7300

APAC +61 (0) 2 8284 8100 | **EMAIL:** reports@mintel.com