

Health and Fitness Clubs - UK - October 2009

Report Price: £1500 / \$3000 / €2250



What is this report about?

This report analyses the current status of the UK health and fitness clubs industry and considers its likely future development, including providing detailed profiles of the major multi-site operators. It also looks at consumer behaviour relating to, and attitudes towards, health and fitness clubs, with a view to identifying market opportunities.

What have we found out?

- Between 2004 and 2009, Mintel estimates that the health and fitness club will grow by 23.5% in value, although growth has slowed since 2006, as expansion slowed and suitable development sites became more and more scarce, and rents less and less economically viable.
- There were 25% more members of private health and fitness clubs in 2008 compared to 2004, with a marginal increase estimated for 2009.
- Secondary revenue grew at a faster rate than membership and joining fees (between 2004 and 2008), reflecting the increased success clubs are having with marketing ancillary services, such as personal training and health and beauty treatments, as well as bar and catering operations.
- Fitness First is the largest operator by club numbers and members, although following its merger with Next Generation Clubs, David Lloyd is the larger player in terms of turnover with sales of £264 million in its 2008/09 financial year compared to £164 million for Fitness First.
- The top eight operators now account for 617 outlets between them (23% of the total) with 2.18 million members (41% of the total). This compares with 606 outlets and 2.08 million members in 2007.
- Due to the recession, more than a quarter of gym users claim to have cancelled their private gym/health club membership, although this in itself is in line with the annual attrition rates most clubs would expect.

Your business guide towards growth and profitability

Mintel Oxygen is your one-stop shop for market and consumer analysis. It is designed to help you stay on top of market sizes, shares and forecasts, consumer trends, brand profiles and product innovation.

Use Mintel Oxygen to:

- Gain fresh market insight every day
- Drive your business forward based on consumer trends
- Stand out in new business pitches
- Support your decision-making
- Benchmark competitive activity

If you have any questions or require further information, send an email to oxygen@mintel.com or call one of our regional offices:

EMEA: +44 (0)20 7778 7151
Americas: +1 (312) 932 0600
APAC: +61 (0)2 8284 8100