

Health and Fitness Clubs - UK - July 2015

Report Price: £1750.00 | \$2834.04 | €2223.04

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



Nearly four fifths of UK adults have at least one health or fitness goal, yet only 12% currently use a gym. However, the indications for the private health and fitness club sector remain promising, with the continued rise of budget gyms helping to break down the barriers associated with more established clubs; namely cost, location and the commitment of entering long-term contracts.

This report looks at the following areas:

- Does polarisation mean the end for the mid-market?
- How can full-service health and fitness clubs justify their premium?

The pressure on full-service health clubs is intensifying. As shown by the recent troubles experienced by the two biggest mid-market chains, clubs that do not exceed expectations on service level could fall victim to the popularity of budget gyms and the growing range of convenient, hassle-free fitness alternatives.

Personalisation can help these operators to justify their premium price point. Interest in tracking workouts and monitoring nutritional intake suggests that operators need to form a relationship with consumers in and away from the gym. Memberships that include the use of '360-degree' fitness tracking apps or devices can effectively give users access to a virtual personal trainer through setting customised goals, delivering dietary advice and providing feedback.

BUY THIS
REPORT NOW

VISIT:
store.mintel.com

CALL:
EMEA
+44 (0) 20 7606 4533

Brazil
0800 095 9094

Americas
+1 (312) 943 5250

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

Health and Fitness Clubs - UK - July 2015

Report Price: £1750.00 | \$2834.04 | €2223.04

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

Covered in this report

Executive Summary

Polarisation of the gym market to boost value

Figure 1: Forecast for the value of the UK health and fitness club market, 2010-20

Four in five consumers have health or fitness goals

Figure 2: Health and fitness goals, May 2015

Budget operators help industry to widen its net

Figure 3: Health and fitness club usage, April 2014 and May 2015

Payment breaks could be the decisive factor

Figure 4: Factors that influence choice of health and fitness club, May 2015

Cost the main, but not the only barrier

Figure 5: Barriers to using health and fitness clubs, May 2015

Full-service clubs and budget gyms seen as polar opposites

Figure 6: Correspondence analysis – Perceptions of health and fitness-related venues, May 2015

Issues and Insights

Does polarisation mean the end for the mid-market?

The facts

The implications

How can full-service health and fitness clubs justify their premium?

The facts

The implications

The Market – What You Need to Know

Motivation the biggest barrier to a healthy lifestyle

Alternatives pose a greater threat

Competition ruling brings an end to proposed merger

Total number of clubs approaches 3,000

Polarisation of the gym market to boost value

Market Drivers

Motivation the biggest barrier to a healthy lifestyle

Figure 7: Barriers to being healthy, April 2014

Tech brands get fanatical about fitness

Figure 8: Personal ownership of and interest in buying consumer technology products, February 2015

Participation in running sprints ahead

Figure 9: Participation in 'keep fit and gym activities' and running, 2011/12-2014/15

**BUY THIS
REPORT NOW**

VISIT: store.mintel.com

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

Americas +1 (312) 943 5250 | APAC +61 (0) 2 8284 8100

EMAIL: reports@mintel.com

Health and Fitness Clubs - UK - July 2015

Report Price: £1750.00 | \$2834.04 | €2223.04

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

Competition ruling brings an end to proposed merger

Market Size and Forecast

Total number of clubs approaches 3,000

Figure 10: Number of health and fitness clubs in the UK, 2010-15

Growth spread across the UK

Figure 11: Number of health and fitness clubs in the UK*, by region, September 2014

Polarisation of the gym market to boost value

Figure 12: Forecast for the value of the UK health and fitness club market, 2010-20

Expansion of budget gyms widens the industry's net

Figure 13: Forecast for the volume of the UK health and fitness club market, 2010-20

Forecasts

Value

Figure 14: Forecast for the value of the UK health and fitness club market, 2010-20

Volume

Figure 15: Forecast for the volume (members) of the UK health and fitness club market, 2010-20

Segment Performance

Opportunity for membership 'bolt-ons'

Figure 16: UK health and fitness club market, by sector, 2012-15

Key Players – What You Need to Know

Pure Gym becomes the market leader

Full-service health clubs remain the big spenders

Sports retailers up their fitness game

Boutiques give gyms a new face

Fitness First gets personal

Gyms get tech-centric

Train more, pay less

Market Share

Pure Gym's acquisition set to stretch its lead

Figure 17: Number of Pure Gym and The Gym venues, June 2011-June 2015

Figure 18: Leading UK health and fitness club operators, by number of clubs and members, 2015

Further consolidation on the cards

Brand Communication and Promotion

Full-service health clubs remain the big spenders

Figure 19: Advertising expenditure of top 10 operators (by adspend), 2011-14

Launch Activity and Innovation

Sports retailers up their fitness game

Boutiques give gyms a new face

BUY THIS
REPORT NOW

VISIT: store.mintel.com
CALL: EMEA +44 (0) 20 7606 4533 | Brazil 0800 095 9094
Americas +1 (312) 943 5250 | APAC +61 (0) 2 8284 8100
EMAIL: reports@mintel.com

Health and Fitness Clubs - UK - July 2015

Report Price: £1750.00 | \$2834.04 | €2223.04

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

Fitness First gets a refurbishment

Figure 20: Fitness First revenue, 2009-15

Gyms get tech-centric

Nuffield's small victories

Train more, pay less

The Consumer – What You Need to Know

Four in five consumers have health or fitness goals

Budget operators help industry to widen its net

Payment breaks could be the decisive factor

A menu of benefits can help to justify joining fees

Cost the main, but not the only barrier

Full-service clubs and budget gyms seen as polar opposites

Interest in Health and Fitness

Four in five consumers have health or fitness goals

Figure 21: Health and fitness goals, May 2015

Only 13% of people wanting to lose weight go to the gym

Figure 22: Health and fitness club usage among consumers who are interested in losing weight, May 2015

Millennials: The health-conscious generation

Figure 23: Health and fitness goals, by generation, May 2015

Health and Fitness Club Usage

Budget operators help industry to widen its net

Figure 24: Health and fitness club usage, April 2014 and May 2015

Price still a barrier

Figure 25: Health and fitness club usage, by gender, age and financial situation, May 2015

A '360-degree' fitness tracker has appeal

Figure 26: Health and fitness goals, by health and fitness club usage, May 2015

Influences on Choice of Club

Payment breaks could be the decisive factor

Figure 27: Factors that influence choice of health and fitness club, May 2015

Let's Make a Deal

Clubs can tailor offers to suit Mum and Dad

Figure 28: Factors that influence choice of health and fitness club, by parents of under-16s, May 2015

Rewards can reduce churn

Figure 29: Factors that influence choice of health and fitness club, by usage of health and fitness clubs, May 2015

Joining Fees

A menu of benefits can help to justify joining fees

Figure 30: Joining fee contributions, May 2015

Personal training top of the bill

BUY THIS
REPORT NOW

VISIT: store.mintel.com

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

Americas +1 (312) 943 5250 | APAC +61 (0) 2 8284 8100

EMAIL: reports@mintel.com

Health and Fitness Clubs - UK - July 2015

Report Price: £1750.00 | \$2834.04 | €2223.04

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

Barriers

Cost the main, but not the only barrier

Figure 31: Barriers to using health and fitness clubs, May 2015

Raising awareness of non-fitness-related facilities

Figure 32: Lack of interest in fitness activities, by generation, May 2015

Removing psychological and contractual barriers

Figure 33: Barriers to using health and fitness clubs, by people who are interested in losing weight, May 2015

Figure 34: Barriers to using health and fitness clubs, by perceptions of full-service health clubs and budget gyms, May 2015

Correspondence Analysis – Perceptions of Venues

Full-service clubs and budget gyms seen as polar opposites

Figure 35: Correspondence analysis – Perceptions of health and fitness-related venues, May 2015

Figure 36: Perceptions of health and fitness-related venues, May 2015

Technology can help gyms to keep fit

Figure 37: Perceptions of health and fitness-related venues as being innovative, by age, May 2015

Gyms lagging behind on social interaction

Figure 38: Perceptions of health and fitness-related venues as sociable, May 2015

Appendix – Data Sources, Abbreviations and Supporting Information

Data sources

Abbreviations

Market size and forecast

Value

Figure 39: Best- and worst-case forecast for the value of the UK health and fitness club market, 2015-20

Volume

Figure 40: Best- and worst-case forecast for the volume of the UK health and fitness club market, 2015-20

Fan chart forecast

The consumer

Correspondence analysis

BUY THIS
REPORT NOW

VISIT: store.mintel.com

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

Americas +1 (312) 943 5250 | APAC +61 (0) 2 8284 8100

EMAIL: reports@mintel.com