

Health and Fitness Clubs - US - November 2015

Report Price: £2466.89 | \$3995.00 | €3133.71

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



"Health club revenues have increased substantially since 2010, and due to a general consumer focus on health and wellness, revenues are projected to continue in an upward trend into 2020."

- Marissa Gilbert, Health and Wellness Analyst

This report looks at the following areas:

- Working out at home is more appealing than a fitness facility
- The majority of consumers are not interested in joining a fitness facility
- Rural dwellers are not engaged in exercise or paying for fitness

This report will illustrate the qualities consumers seek from health and fitness clubs. Readers will gain a sense of what type of commitment adults currently have and understand which features are most important in a fitness facility.

Despite its positive outlook, the health and fitness club market is up against some challenges, including consumer preferences for exercising at home, low interest in joining a gym, and hard-to-reach consumers in rural areas. Opportunities for growth will come from diversified offerings, such as customized memberships, tailored workouts, and streaming online workouts, as well as growth from expansions of low budget and specialized gyms.

This report covers the US market for private/commercial health and fitness clubs.

Mintel defines private and commercial health and fitness clubs as those being operated by an individual or a corporate, for-profit organization. Nonprofit health and fitness clubs are defined as those facilities that offer health and fitness memberships to consumers, yet do not profit from these memberships. The spa industry and tennis/racquet club industry, except the services as they relate to the health and fitness industry, are not included.

The analysis contained within the consumer sections of this report does, however, consider all types of health and fitness clubs. Throughout this report, the terms health club/facility, fitness club/facility, and gym are used interchangeably.

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

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 - US - November 2015

Report Price: £2466.89 | \$3995.00 | €3133.71

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

Definition

Executive Summary

The issues

Working out at home is more appealing than a fitness facility

Figure 1: Location adults engaged in regular exercise in the last year, 2010-15

The majority of consumers are not interested in joining a fitness facility

Figure 2: Current commitment to fitness facilities, July 2015

Rural dwellers are not engaged in exercise or paying for fitness

Figure 3: Approach to fitness, by area, July 2015

The opportunities

Tailor classes to specific abilities; target older adults

Figure 4: Importance of tailored classes, by age, July 2015

Fitness facilities should reach beyond the traditional walls of the gym

Figure 5: Current use or interest in streaming online fitness videos, July 2015

Hispanic adults are engaged in exercise; more can be converted to gym members

Figure 6: Approach to fitness, by race and Hispanic origin, July 2015

What it means

The Market – What You Need to Know

Health and fitness club market continues to grow

The number of fitness clubs and memberships have increased

Most are interested in working out at home; some choose not to exercise

Opportunity exists with aging US population and Hispanic consumers

Market Size and Forecast

Health and fitness club market continues experiencing growth

Figure 7: Total US revenue and fan chart forecast of health and fitness clubs, at current prices, 2010-20

Figure 8: Total US revenues and forecast of health and fitness clubs, at current prices, 2010-20

Market Breakdown

Number of clubs and memberships have increased

Figure 9: Number of US health and fitness clubs and memberships, 2010-14

Fitness facility interest levels are stronger than commitment

Figure 10: Fitness facility types, by commitment level, July 2015

Market Perspective

Working out at home is most appealing

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

Health and Fitness Clubs - US - November 2015

Report Price: £2466.89 | \$3995.00 | €3133.71

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

Figure 11: Perceptions toward working out at home, July 2015

Figure 12: Location adults engaged in regular exercise in the last year, 2010-15

Almost one quarter of adults are not exercising

Figure 13: Unable or choose not to exercise, by age, July 2015

Market Factors

Exercise participation rates remains steady, exercising at gym increases

Figure 14: Adults engaged in regular exercise program and location, 2013-15

Aging US population offers opportunity for market growth

Figure 15: US population aged 18 or older, by age, 2010-20

Figure 16: Location adults engaged in regular exercise in the last year, by age, April 2014-June 2015

The growing Hispanic population is most likely to exercise

Figure 17: US population of adults 18+, by race and Hispanic origin, 2010-20

Figure 18: Approach to fitness, by race and Hispanic origin, July 2015

Key Players – What You Need to Know

Network memberships, brand growth, and classes that motivate

Fitness facilities tailored to specific demographics and needs

Both technology and unplugging finding their way into fitness

The fastest growing private fitness company and the next big workout

What's In?

One membership gains access to a variety of fitness facilities

Fitness facilities go public or franchise for expansion

Interval classes in group settings motivate; welcome everyone

What's Next?

Older adults are exercising, tailor classes to their abilities

Figure 19: Approach to fitness, by age, July 2015

Figure 20: Time barrier to achieving ideal health, any rank, by age, May 2015

Adaptive equipment gives exercisers with disabilities opportunities

Gyms offer a recess, allowing adults to be a kid again

A social community and exercise tips powered by beacon technology

Make your fitness studio a reality, on a reality TV competition

TITLE Boxing is the fastest growing privately owned fitness company

Guided meditation classes encourage unplugging to de-stress

The Consumer – What You Need to Know

Free workouts preferred; though young adults, higher income willing to pay

Yearly commitment most common; yet most not interested in a facility

Adults focus on operation hours, number of machines, and discounts

Cleanliness and crowds are top barriers; social aspects appreciated

Consumers want customized memberships

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

Health and Fitness Clubs - US - November 2015

Report Price: £2466.89 | \$3995.00 | €3133.71

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

Free fitness options, deal seekers, and tech contribute to competition

Approach to Fitness

Adults are seeking out free alternatives when it comes to working out

Figure 21: Approach to fitness, July 2015

Adults 25-44 most likely to pay for fitness center access

Figure 22: Approach to fitness, by age, July 2015

Paying to exercise declines with income

Figure 23: Approach to fitness, by household income, July 2015

Where you live impacts where you exercise

Figure 24: Approach to fitness, by area, July 2015

Hispanic adults most likely to exercise

Figure 25: Approach to fitness, by race and Hispanic origin, July 2015

Commitment to Fitness Facility

Overview of commitment to fitness facilities

Figure 26: Current commitment to fitness facilities, July 2015

Profile: Currently has a yearly membership

Figure 27: Currently has a yearly commitment to any fitness facility, by select demographics, July 2015

Profile: Currently pays month-to-month has short-term commitment

Figure 28: Currently has a month-to-month/short-term commitment to any fitness facility, by select demographics, July 2015

Profile: Currently have no commitment but interested in joining

Figure 29: Currently has no commitment to fitness facility; interested in joining, by select demographics, July 2015

Profile: Currently no commitment, no interest in joining

Figure 30: Currently has no commitment or interest to join fitness facility, by select demographics, July 2015

Important Features of Fitness Facilities

Long hours, plenty of machines, and discounts are essential

Figure 31: Importance of fitness facility features, July 2015

Men and women differ on what's important in a fitness facility

Figure 32: Importance of weight machines and sport courts, by gender, July 2015

Figure 33: Importance of tailored classes and good variety, by gender, July 2015

Urban dwellers place higher importance on facility features

Figure 34: Importance of fitness facility features, by area, July 2015

Hispanic adults want more from their fitness facility

Figure 35: Importance of fitness facility features, by Hispanic origin, July 2015

Perceptions of Fitness Facilities

Cleanliness and crowds are gym's top barriers for improvement

Figure 36: Perceptions toward fitness facilities, July 2015

Younger adults appreciate the social aspect more than older adults

Figure 37: Fitness facilities offer acceptance and social opportunities, by age, July 2015

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

Health and Fitness Clubs - US - November 2015

Report Price: £2466.89 | \$3995.00 | €3133.71

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

Obese adults express less comfort and familiarity with the gym

Figure 38: Fitness facilities perceptions, by BMI, July 2015

Adults who pay for a fitness facility membership recognize the value

Figure 39: Value perceptions of fitness facilities, by approach to fitness, July 2015

Black adults agree gyms offer camaraderie; benefits outweigh the costs

Figure 40: Fitness facilities perceptions, by race and Hispanic origin, July 2015

Top Fitness Facility Amenities

Consumers want to customize their membership

Figure 41: Preference of fitness facility amenities, any rank, July 2015

Age and gender influences the types of amenities adults want

Figure 42: Preference of offering rewards and organized sports, any rank, by age and gender, July 2015

Figure 43: Preference of offering fitness assessment and small-group personal training, any rank, by age and gender, July 2015

Amenities preferences vary little by race and Hispanic origin

Figure 44: Preference of fitness facility amenities, any rank, by race and Hispanic origin, July 2015

Alternatives to Fitness Facilities

Free workouts compete with gyms; sponsor events to draw in members

Figure 45: Current use or interest in using free exercise facilities, July 2015

Figure 46: interest in using free exercise facilities, by gender and age, July 2015

Fitness facilities can still earn revenue through non-members

Figure 47: Current use or interest in using fitness discount companies, July 2015

Figure 48: Current use or interest in using fitness discount companies, by generation, July 2015

Technology empowers fitness whenever, wherever

Figure 49: Current use or interest in using technology for fitness, July 2015

Figure 50: Current use or interest in using technology for fitness, by age and income, July 2015

Appendix – Data Sources and Abbreviations

Data sources

Sales data

Fan chart forecast

Consumer survey data

Consumer qualitative research

Abbreviations and terms

Abbreviations

Terms

Appendix – Market

Figure 51: Total US revenues and forecast of health and fitness clubs, at inflation-adjusted prices, 2010-20

Figure 52: Adults who have engaged in regular exercise program in the past year, 2013-15

Figure 53: Location adults engaged in regular exercise in the past year, 2013-15

Figure 54: Location adults engaged in regular exercise in the last year, by age, April 2014-June 2015

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

Health and Fitness Clubs - US - November 2015

Report Price: £2466.89 | \$3995.00 | €3133.71

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

Appendix – Key Players

Figure 55: Participated in boxing, karate, martial arts, kickboxing in the past year, April 2014-June 2015

**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