

# Health and Fitness Clubs - UK - 2021

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## This report looks at the following areas:

- The impact of COVID-19 on the private health and fitness club market
- Health and fitness club membership levels and future interest in joining a gym
- Consumers' preferred membership/subscription types
- Consumers' interest in indoor, outdoor and online fitness facilities/services.

Following forced gym closures throughout 2020 and early 2021, virtually all gym members either had their memberships frozen or opted to cancel. However, it hasn't taken long for the majority to reactivate their memberships with 58% returning to gyms as at June 2021, while most of those yet to unfreeze their membership planned to return in the following 12 months.

As a result of a progressing vaccination programme, COVID-19 will not seem as much of a threat but it has altered consumers' purchasing habits in the long term. Despite being an adventurous age group, younger consumers have become a lot more financially aware as a result of the pandemic, and are therefore more likely to favour cost-effective options. Just over 1 in 4 16-24s who have a membership or are interested in joining the gym would prefer to opt for a discounted off-peak membership, whilst a quarter would prefer the pay as you go payment option.

The main threat to the private health and fitness industry is potential of further forced closures in the event of future lockdowns. Online fitness services served consumers very well during gym closures, however, and higher demand for these services will be one of the main legacies of the pandemic even now gyms are back open.

Meanwhile demand for outdoor fitness continues to grow as consumers seek out safe ways to exercise and a change of scenery. Fitness operators should continue to focus on enhancing their online and outdoor propositions in order



"While the private health and fitness market will benefit from pent up demand from gym goers, the preference for online and outdoor fitness remain strong, so fitness operators will be expected to offer hybrid memberships that include access to these facilities and services."

– Narmada Sarvanantha,  
Leisure Analyst

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to offer best-in-class 'hybrid memberships' that offer access to both online and offline services, including outdoor facilities.



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