

Health and Fitness Clubs - UK - 2023

Report Price: £2195 | \$2995 | €2600

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

This report looks at the following areas:

- How the rising cost of living is impacting the health and fitness club market
- Recent company activity and new innovations in the market
- Consumers' perceptions of key players in the health and fitness club industry
- Health and fitness club membership levels and future interest in joining a gym
- Consumers' preferred membership/subscription types
- Consumers' perceptions of alternative operators

The continued rise of the low-cost gym sector is driving the growth of the health and fitness clubs market. The number of budget gyms reached an all-time high of 869 in 2023, up from 645 in 2018. The affordability of these clubs has cemented their appeal amidst the ongoing cost of living crisis, whilst the flexible nature of monthly contracts and no/low joining fees have also contributed to their success.

70% of members say they have experienced price rises at private health and fitness clubs in the last 12 months. With the cost of living crisis impacting consumers and brands alike, operators have had to pass rising utility costs onto members. Moving forward, brands should offer a variety of plans at different price points, to continue to appeal to consumers of all financial situations.

Alternative operators pose the greatest threat to the traditional health and fitness club model. ClassPass and Gympass have disrupted the market in recent years, by offering a credit-based system for consumers to enjoy various gyms on an ad-hoc basis. Brands offering contract-based memberships need to focus on providing flexibility and value to members, in order to remain favourite and trusted brands.

The UK's ageing population means that brands have a significant opportunity to target a relatively unexplored segment. Older consumers are keen to



“Despite the ongoing cost of living crisis and increases to the price of gym memberships, consumers continue to prioritise services that benefit their health and wellbeing. However, in order to sustain growth, operators need to cater to less affluent and older consumers – both of which offer huge opportunities for operators.”

– Jennie Bryans, Leisure Analyst

Buy this report now

Visit store.mintel.com

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

Health and Fitness Clubs - UK - 2023

Report Price: £2195 | \$2995 | €2600

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

prioritise their health, particularly as they get older, and brands need to ensure they are capturing this segment of the market. Many older consumers will appreciate guidance and support within health clubs, as well as tailored sessions and events during quieter hours for them to enjoy.



What's included

Executive Summary

Full Report PDF

Infographic Overview

Powerpoint Presentation

Interactive Databook

Previous editions

Did you know?

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

All Mintel 2020 reports contain specific COVID-19 related research and forecasts. The world's leading brands rely on Mintel reports for the most complete, objective and actionable market intelligence.

Buy this report now

Visit store.mintel.com

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

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

Table of Contents

OVERVIEW

- Key issues covered in this Report
- Products covered in this Report

EXECUTIVE SUMMARY

- **The five-year outlook for health and fitness clubs**
Figure 1: Category outlook, 2023-28
- **The market**
- **Market value reaches an all-time high**
Figure 2: Market forecast for private health and fitness clubs, 2018-28
- **A third of workers still adopt a hybrid approach**
Figure 3: Current work location, 2023
- **Companies and brands**
- **Low-cost segment continues to perform well**
Figure 4: Key players in the low-cost segment by estimated market share in terms of number of sites, 2023
- **PureGym ramps up spending on advertising**
- **High quality clubs come with a price tag**
Figure 5: Attitudes, by brand, 2023
- **The consumer**
- **Membership numbers continue to recover**
Figure 6: Membership of private health and fitness clubs, 2019, 2022 and 2023
- **90% use the gym at least weekly**
Figure 7: Frequency of health and fitness club visits, 2019 and 2023
- **Monthly memberships remain most popular**
Figure 8: Membership payment types for health and fitness club, 2023
- **Public leisure centres remain the biggest competitor**
Figure 9: Usage of alternative operators, 2023
- **Opportunity for alternative brands to reach new audiences**
- **Despite price being at the forefront of consumers' minds, health and wellbeing remains a key priority**
Figure 10: Behaviours relating to health and fitness clubs, 2023
- **Hybrid gym going remains the preference**
Figure 11: Behaviours relating to health and fitness clubs, 2023

What's included

Executive Summary

Full Report PDF

Infographic Overview

Powerpoint Presentation

Interactive Databook

Previous editions

Did you know?

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

All Mintel 2020 reports contain specific COVID-19 related research and forecasts. The world's leading brands rely on Mintel reports for the most complete, objective and actionable market intelligence.

Buy this report now

Visit store.mintel.com

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

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

ISSUES AND INSIGHTS

- Health and wellbeing remain a priority despite increases in the cost of living...
- ...but financial strength continues to support membership levels
- Alternative operators pose real threat to traditional health and fitness club model
- Essential for operators to focus on attracting older consumers

MARKET SIZE AND PERFORMANCE

- Market value reaches an all-time high
Figure 12: Private health and fitness clubs' revenue, 2018-23

MARKET FORECAST

- Long-term future looks strong for health and fitness clubs
Figure 13: Category outlook, 2023-28
- Market expected to continue to perform strongly
Figure 14: Market forecast for private health and fitness clubs, 2018-28
- Learnings from the last income squeeze
- Forecast methodology

MARKET DRIVERS

- Inflation continues to eat into consumer spending power over the course of 2023
- Consumer spending power will be curbed
- Consumers' financial wellbeing has fallen from the highs of 2021
Figure 15: Household financial wellbeing index, 2016-23
- A third of workers still adopt a hybrid approach
Figure 16: Current work location, 2023
- New health consciousness boosts exercise appeal
- Health and fitness clubs will need to appeal to the growing older population
Figure 17: Projected age structure of the UK, 2026

KEY PLAYERS

- PureGym Limited (part of PureGym Group PLC)
- The Gym Group
- Anytime Fitness (part of Self Esteem Brands)
- Nuffield Health
- David Lloyd Leisure (part of Deuce Midco Limited)

What's included

- Executive Summary
- Full Report PDF
- Infographic Overview
- Powerpoint Presentation
- Interactive Databook
- Previous editions

Did you know?

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

All Mintel 2020 reports contain specific COVID-19 related research and forecasts. The world's leading brands rely on Mintel reports for the most complete, objective and actionable market intelligence.

Buy this report now

Visit	store.mintel.com
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

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

MARKET SHARE

- Low-cost segment continues to perform well**
 Figure 18: Estimated number of sites held by low-cost operators, by year, 2018-23
 Figure 19: Key players in the low-cost segment by estimated market share in terms of number of sites, 2023
- Anytime Fitness continues to dominate the mid-market segment**
 Figure 20: Key players in the mid-market segment by estimated market share in terms of number of sites, 2023
- Premium sites remain resilient**
 Figure 21: Key players in the premium market segment by estimated market share in terms of number of sites, 2023

LAUNCH ACTIVITY AND INNOVATION

- Anytime Fitness launches new app
- Les Mills and Adidas announce partnership
- PureGym over-50s fitness championships
- Blok launches Blokspace; mixing immersive fitness with art and design
- Lululemon and Xponential Fitness expand digital partnership
- Bamford to open a sustainable and science-led luxury fitness club
- Xponential Fitness launched its first London BFT franchise
- Topnotch returns to the UK health and fitness market
- SoulCycle signs partnership with ClassPass
- F45 launches FS8 concept

ADVERTISING AND MARKETING ACTIVITY

- Spending on advertising eases slightly**
 Figure 22: Total above-the line, online display and direct mail advertising expenditure on private health and fitness clubs, 2019-23
 Figure 23: Total above-the-line advertising expenditure on private health and fitness clubs, by media type, 2019-23
- PureGym ramps up spending on advertising**
 Figure 24: Total above-the line, online display and direct mail advertising expenditure of 10 leading private health and fitness club operators, 2019-2023
- Nielsen Ad Intel coverage**

BRAND RESEARCH

- Usage levels remain high for PureGym

What's included

- Executive Summary
- Full Report PDF
- Infographic Overview
- Powerpoint Presentation
- Interactive Databook
- Previous editions

Did you know?

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

All Mintel 2020 reports contain specific COVID-19 related research and forecasts. The world's leading brands rely on Mintel reports for the most complete, objective and actionable market intelligence.

Buy this report now

Visit	store.mintel.com
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

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

Figure 25: Attitudes towards and usage of selected brands, 2023

Figure 26: Key metrics for selected brands, 2023

- **High quality clubs come with a price tag**
- **Virgin Active perceived as innovative and offers good customer service**

Figure 27: Attitudes, by brand, 2023

Figure 28: Brand personality – macro image, 2023

- **Low-cost brands win over consumers**

Figure 29: Brand personality – micro image, 2023

HEALTH AND FITNESS CLUB MEMBERSHIP

- **Membership numbers continue to recover**

Figure 30: Membership of private health and fitness clubs, 2019, 2022 and 2023

- **Financial strength supports membership levels**

Figure 31: Membership of private health and fitness clubs, by financial situation, 2023

- **Men are more likely to be members of health and fitness clubs**

- **Essential for operators to focus on attracting older consumers**

Figure 32: Membership of private health and fitness clubs, by gender and age, 2023

FREQUENCY OF VISITS

- **90% use the gym at least weekly**

Figure 33: Frequency of health and fitness club visits, 2019 and 2023

- **One fifth of men attend the gym five times a week or more**

Figure 34: Frequency of health and fitness club visits, by gender, 2023

MEMBERSHIP PAYMENTS

- **Monthly memberships remain most popular**

Figure 35: Membership payment types for health and fitness club, 2023

- **Nearly three quarters pay less than £40**

Figure 36: Membership prices per month, 2023

Figure 37: Membership prices per month, 2023

- **City dwellers prepared to pay more for memberships**

Figure 38: Membership prices per month, by area, 2023

What's included

Executive Summary

Full Report PDF

Infographic Overview

Powerpoint Presentation

Interactive Databook

Previous editions

Did you know?

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

All Mintel 2020 reports contain specific COVID-19 related research and forecasts. The world's leading brands rely on Mintel reports for the most complete, objective and actionable market intelligence.

Buy this report now

Visit store.mintel.com

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

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

ALTERNATIVE OPERATORS

- **Public leisure centres remain the biggest competitor**
Figure 39: Usage of alternative operators, 2023
- **Opportunity for alternative brands to reach new audiences**
- **Affluent households able to stomach the cost of innovative offerings**

BEHAVIOURS RELATING TO HEALTH AND FITNESS CLUBS

- **Despite price being at the forefront of consumers' minds, health and wellbeing remains a key priority**
Figure 40: Behaviours relating to health and fitness clubs, 2023
- **Opportunity for brands to place community at the heart of clubs**
- **Hybrid gym going remains the preference**
Figure 41: Behaviours relating to health and fitness clubs, 2023

APPENDIX – DATA SOURCES, ABBREVIATIONS AND SUPPORTING INFORMATION

- **Abbreviations**
- **Consumer research methodology**

APPENDIX – FORECAST METHODOLOGY

- **Market forecast and prediction intervals**
Figure 42: Lower-bound, central and upper-bound forecast for private health and fitness clubs, 2023-28
- **Market drivers and assumptions**
- **Forecast methodology**

What's included

Executive Summary

Full Report PDF

Infographic Overview

Powerpoint Presentation

Interactive Databook

Previous editions

Did you know?

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

All Mintel 2020 reports contain specific COVID-19 related research and forecasts. The world's leading brands rely on Mintel reports for the most complete, objective and actionable market intelligence.

Buy this report now

Visit store.mintel.com

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



About Mintel

Mintel is the **expert in what consumers want and why**. As the world's leading market intelligence agency, our analysis of consumers, markets, product innovation and competitive landscapes provides a unique perspective on global and local economies. Since 1972, our predictive analytics and expert recommendations have enabled our clients to make better business decisions faster

Our purpose is to help businesses and people grow. To find out how we do that, visit **[mintel.com](https://www.mintel.com)**.