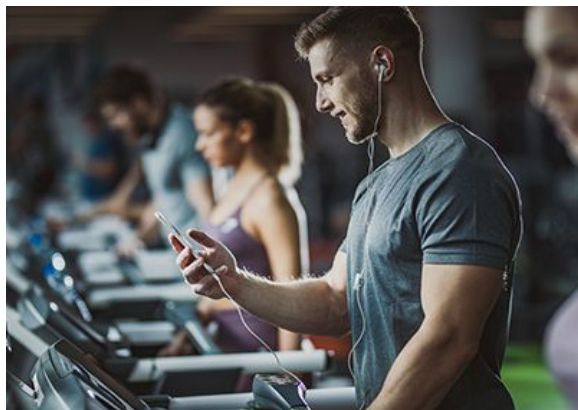


Health and Fitness Clubs - UK - July 2019

Report Price: £1995.00 | \$2693.85 | €2245.17

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



“Growth in health and fitness clubs is being driven by low-cost operators, with little sign of the expansion of locations slowing in the short term. While people are keener than ever to take on active challenges and boost their health, intense competition is coming from the home workout market and wide range of boutique fitness studios.”

– **Paul Davies, Category Director, Leisure Research**

This report looks at the following areas:

- Varied classes and friendly instructors are vital for boosting attendance
- The desire for tracking performance is driving the use of technology in fitness

Traditional gyms must ensure they are utilising technology to allow members to track their progress, while providing more personal interaction from high-quality staff and personal trainers.

**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 - UK - July 2019

Report Price: £1995.00 | \$2693.85 | €2245.17

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
Products covered in this Report

Executive Summary

The market

Private health and fitness club membership passes the 6 million mark

Competition for new members will limit revenue growth over the next five years

Figure 1: Value of the UK private health and fitness club market, 2014-24

Figure 2: Volume of the UK private health and fitness club market, 2014-24

More leisure time is being spent on gym visits

Figure 3: Use of gyms/leisure centres in the past month, October 2017-May 2019

Companies and brands

PureGym continues to expand its number of locations

Figure 4: Leading private health and fitness club operators, by number of sites, June 2019

The Gym Group cements its positions as the second-largest gym brand

Figure 5: Leading private health and fitness club operators, by estimated membership numbers, June 2019

The consumer

Rise in private health and fitness club membership to 18%

Figure 6: Health and fitness club membership, March 2019

Leisure centre membership lags behind private health clubs

Figure 7: Membership of public leisure centres, March 2019

Cost is the main concern for non-members

Figure 8: Reasons for not joining a health and fitness club, March 2019

Over six in 10 members use gyms three times a week or more

Figure 9: Frequency of health and fitness club visits, March 2019

Half of people are paying £15-39.99 per month for membership

Figure 10: Health and fitness club membership fees, May 2018 and March 2019

People expect clean gyms and working equipment even at low-cost facilities

Figure 11: Attitudes towards health and fitness club facilities, March 2019

Classes and group exercise motivate more people than individual workouts

Figure 12: Attitudes towards health and fitness club classes, March 2019

Keeping members updated on their progress is vital

Figure 13: Attitudes towards health and fitness clubs, March 2019

Friendly instructors and varied classes are key to driving usage

Figure 14: Drivers of health and fitness club usage, March 2019

What we think

Issues and Insights

**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 - UK - July 2019

Report Price: £1995.00 | \$2693.85 | €2245.17

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

Varied classes and friendly instructors are vital for boosting attendance

The facts

The implications

The desire for tracking performance is driving the use of technology in fitness

The facts

The implications

The Market – What You Need to Know

Private health and fitness club membership passes the 6 million mark

Competition for new members will limit revenue growth over the next five years

Membership fees continue to grow and dominate revenue

More leisure time is being spent on gym visits

Leading health and fitness clubs rapidly expanding their number of sites

Franchise model is supporting growth in locations and local ownership

Market Size and Forecast

Private health and fitness club membership passes the 6 million mark

Competition for new members will limit revenue growth over the next five years

Figure 15: Value of the UK private health and fitness club market, 2014-24

Figure 16: Value of the UK private health and fitness club market, 2014-24

Figure 17: Volume of the UK private health and fitness club market, 2014-24

Figure 18: Volume of the UK private health and fitness club market, 2014-24

Forecast methodology

Market Segmentation

Membership fees continue to grow and dominate revenue...

...but clubs are seeking to expand revenue streams

Figure 19: Consumer spending in private health and fitness clubs, 2014-19

Market Drivers

More leisure time is being spent on gym visits

Figure 20: Use of gyms/leisure centres in the past month, October 2017-May 2019

Leading health and fitness clubs rapidly expanding their number of sites

Franchise model is supporting growth in locations and local ownership

Tracking health via technology is driving the fitness market

Diversification of exercise trends driving new specialist sites

Home workouts providing new competition to the gym market

Companies and Brands – What You Need to Know

PureGym continues to expand its number of locations

The Gym Group cements its positions as the second-largest gym brand

Health and fitness innovations showcased at CES 2019

Apple expands the use of its GymKit technology

**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 - UK - July 2019

Report Price: £1995.00 | \$2693.85 | €2245.17

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

Top 10 health and fitness club advertising spend declines in 2018

Key Players

PureGym

Figure 21: PureGym estimated site numbers, member numbers, revenue, region, offer and outlook, June 2019

The Gym Group

Figure 22: The Gym Group estimated site numbers, member numbers, revenue, region, offer and outlook, June 2019

Anytime Fitness

Figure 23: Anytime Fitness estimated site numbers, member numbers, revenue, region, offer and outlook, June 2019

DW Fitness First

Figure 24: DW Fitness First estimated site numbers, member numbers, revenue, region, offer and outlook, June 2019

Nuffield Health

Figure 25: Nuffield Health estimated site numbers, member numbers, revenue, region, offer and outlook, June 2019

David Lloyd Leisure

Figure 26: David Lloyd Leisure estimated site numbers, member numbers, revenue, region, offer and outlook, June 2019

Market Share

PureGym continues to expand its number of locations...

Figure 27: Leading private health and fitness club operators, by number of sites, June 2019

...while membership is now approaching 1.2 million

Figure 28: Leading private health and fitness club operators, by estimated membership numbers, June 2019

Launch Activity and Innovation

Health and fitness innovations showcased at CES 2019

Apple expands the use of its GymKit technology

Black Box opens two VR gym booths in the US

Peloton set to open permanent London studios

Third Space set to expand further in London

East London cross-fit studio Blok expands into Manchester

Increasing focus on total wellbeing and mental health

Advertising and Marketing Activity

Total health and fitness club advertising spend declines in 2018

Figure 29: Total above-the-line, online display and direct mail advertising expenditure on health and fitness clubs, by top 10 advertisers, 2018

Sponsorships and partnerships

Nielsen Ad Intel coverage

Brand Research

Brand map

Figure 30: Attitudes towards and usage of selected brands, April 2019

Key brand metrics

Figure 31: Key metrics for selected brands, April 2019

Brand attitudes: Market leader PureGym deemed the best value for money

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 - UK - July 2019

Report Price: £1995.00 | \$2693.85 | €2245.17

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

Figure 32: Attitudes, by brand, April 2019

Brand personality: Expanding number of locations is making budget brands more accessible

Figure 33: Brand personality – macro image, April 2019

Nuffield Health seen as offering the most expert service

Figure 34: Brand personality – micro image, April 2019

Brand analysis

PureGym mass appeal down to value for money and widespread locations

Figure 35: User profile of PureGym, April 2019

Nuffield Health's wider wellbeing focus boosts trust in expertise

Figure 36: User profile of Nuffield Health, April 2019

David Lloyd Clubs offer a more exclusive, high-end option

Figure 37: User profile of David Lloyd Clubs, April 2019

DW Fitness First has an accessible, fun brand image

Figure 38: User profile of DW Fitness First, April 2019

Anytime Fitness is struggling for brand awareness

Figure 39: User profile of Anytime Fitness, April 2019

The Consumer – What You Need to Know

Rise in private health and fitness club membership to 18%

The strongest growth potential is among 16-24 year olds

Cost is the main concern for non-members

Over six in 10 members use gyms three times a week or more

Half of people are paying £15-39.99 per month

People expect clean gyms and working equipment even at low-cost facilities

Quality instructors are key for three quarters of people

Classes and group exercise motivate more people than individual workouts

Keeping members updated on their progress is vital

Friendly instructors and varied classes are key to driving usage

Health and Fitness Club Membership

Rise in private health and fitness club membership to 18%

Figure 40: Health and fitness club membership, March 2019

The strongest growth potential is among 16-24 year olds

Figure 41: Health and fitness club usage, by age, March 2019

Leisure centre membership lags behind private health clubs

Figure 42: Membership of public leisure centres, March 2019

Public leisure centres are most popular among 16-24 year olds

Figure 43: Membership of public leisure centres, by age, March 2019

Reasons for Not Using Health and Fitness Clubs

Cost is the main concern for non-members

**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 - UK - July 2019

Report Price: £1995.00 | \$2693.85 | €2245.17

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

Figure 44: Reasons for not joining a health and fitness club, March 2019

Concerns over appearance are dissuading more young people and women

Figure 45: Reasons for not joining a health and fitness club, by gender, March 2019

Frequency of Health and Fitness Club Use

Over six in 10 members use gyms three times a week or more

Figure 46: Frequency of health and fitness club visits, March 2019

25-34 year olds are the most frequent users of health and fitness clubs

Figure 47: Health and fitness club usage, by age, March 2019

Membership Fees of Health and Fitness Clubs

Half of people are paying £15-39.99 per month for membership

Younger men are paying the lowest membership fees

Figure 48: Health and fitness club membership fees, May 2018 and March 2019

Attitudes towards Health and Fitness Clubs

People expect clean gyms and working equipment even at low-cost facilities

Figure 49: Attitudes towards health and fitness club facilities, March 2019

Quality instructors are key for three quarters of people

Classes and group exercise motivate more people than individual workouts

Figure 50: Attitudes towards health and fitness club classes, March 2019

Keeping members updated on their progress is vital

Nearly nine in 10 people prefer to work out when clubs are quiet

Figure 51: Attitudes towards health and fitness clubs, March 2019

Enjoyment is more important than location for Older Millennials

Figure 52: Health and fitness clubs – CHAID – tree output, March 2019

Driving the Use of Health and Fitness Clubs

Gyms will come under increasing pressure from home workouts and fitness apps

Friendly instructors and varied classes are key to driving usage

Gyms must utilise technology to help people track workout progress

Prioritise varied classes to encourage more women to attend

Figure 53: Drivers of health and fitness club usage, March 2019

Gyms could boost attendance among three quarters of people

Figure 54: TURF Analysis – health and fitness clubs, March 2019

Appendix – Data Sources, Abbreviations and Supporting Information

Abbreviations

Consumer research methodology

Figure 55: Table – TURF Analysis – health and fitness clubs, March 2019

CHAID methodology

Figure 56: Health and fitness clubs – CHAID – table output, March 2019

**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 - UK - July 2019

Report Price: £1995.00 | \$2693.85 | €2245.17

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

Appendix – Market Size and Forecast

Market value

Figure 57: Forecast of consumer expenditure on private health and fitness clubs, 2019-24

Market volume

Figure 58: Forecast of private health and fitness club user numbers, 2019-24

Forecast methodology

**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