

The background of the cover is a vibrant, abstract composition of overlapping, wavy, organic shapes in a variety of colors including light blue, green, pink, purple, orange, and yellow. The colors transition smoothly, creating a sense of movement and energy.

boomerang

HEALTH CLUB INDUSTRY
2016 REPORT

Insight

Research Topics



[1] The Total UK Market



[2] Private Health Clubs



[3] Public Gyms



Health Clubs

The Total UK Market

9.2m

members across the UK

14.3%

UK adult penetration rate



Health Clubs

The Total UK Market

6,435

UK gyms

224

new openings in the last 12
months

Health Clubs

Industry growth since 2011



£4.4bn
market value

Club numbers

6.5%



Membership

22%

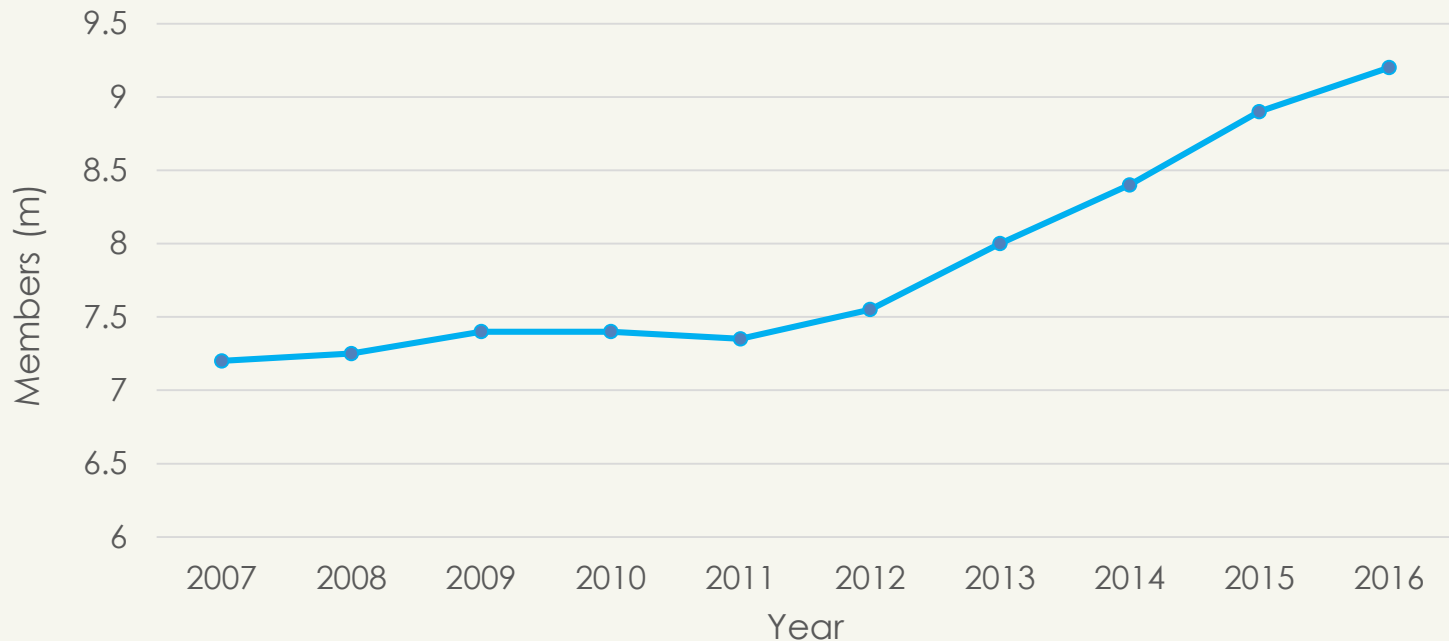


Health Clubs

Penetration growth



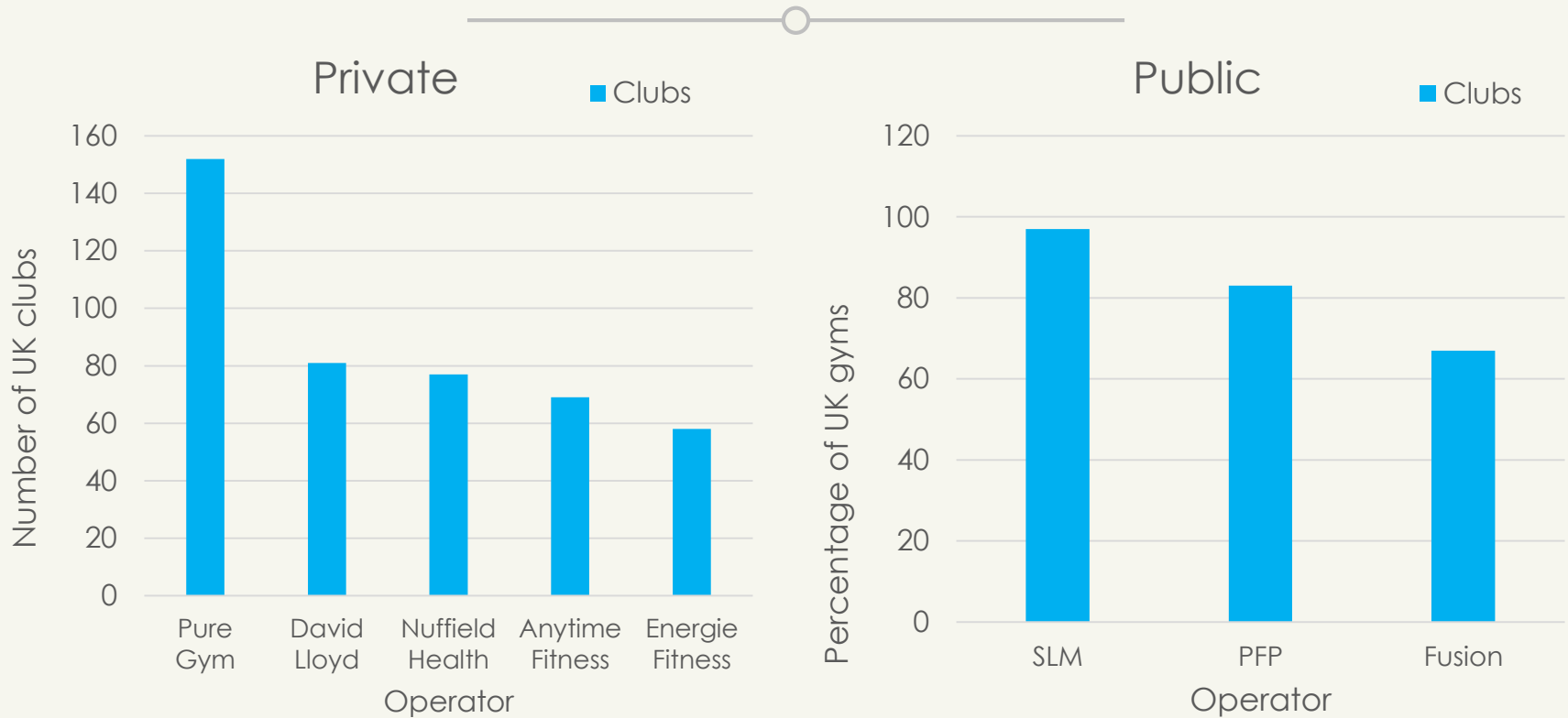
Number of members: 2007-2016



The number of UK adult members has grown steadily since 2011 - increasing by [22%](#).

Health Clubs

Where do our clubs rank?



Pure Gym is the UK's top private gym operator with 152 clubs. In the public sector, SLM (Everyone Active) and PFP rank the second and third highest in the UK with 97 and 82 gyms.

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Health Clubs

Private

5.88
million members

9.1%

UK adult penetration rate



A woman with long dark hair, wearing a purple tank top and black pants, is sitting on a rowing machine in a gym. She is looking towards the camera. In the background, there is a wall with the 'Pure Gym' logo and a television screen. The gym has bright lighting and various exercise equipment.

Health Clubs

Private

- Private clubs have been largely responsible for industry growth
 - Private membership has increased by 8% In the last 12 months
 - For the first time ever, the private industry is worth over £3 billion
- Private low cost clubs have made the biggest impact, making the industry more accessible and pushing fees down
 - Average fees decreased by 1.5% in the last 12 months

Health Clubs

Club openings in the last 12 months



£71m
increase in
market value

82
clubs



288k
members



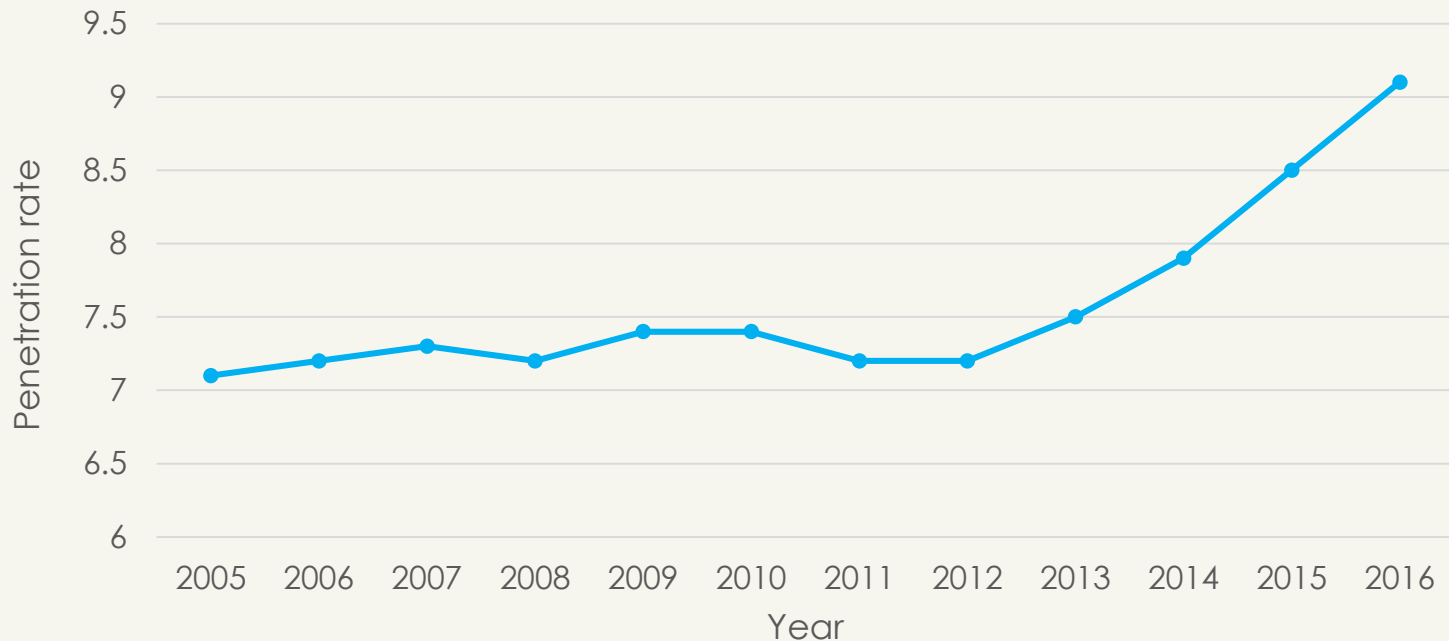
The majority of the growth has been contributed to by low cost operator
Pure Gym, opening **60** new gyms in the last 12 months

Private Health Clubs

Penetration growth



Penetration rate: 2005 - 2016



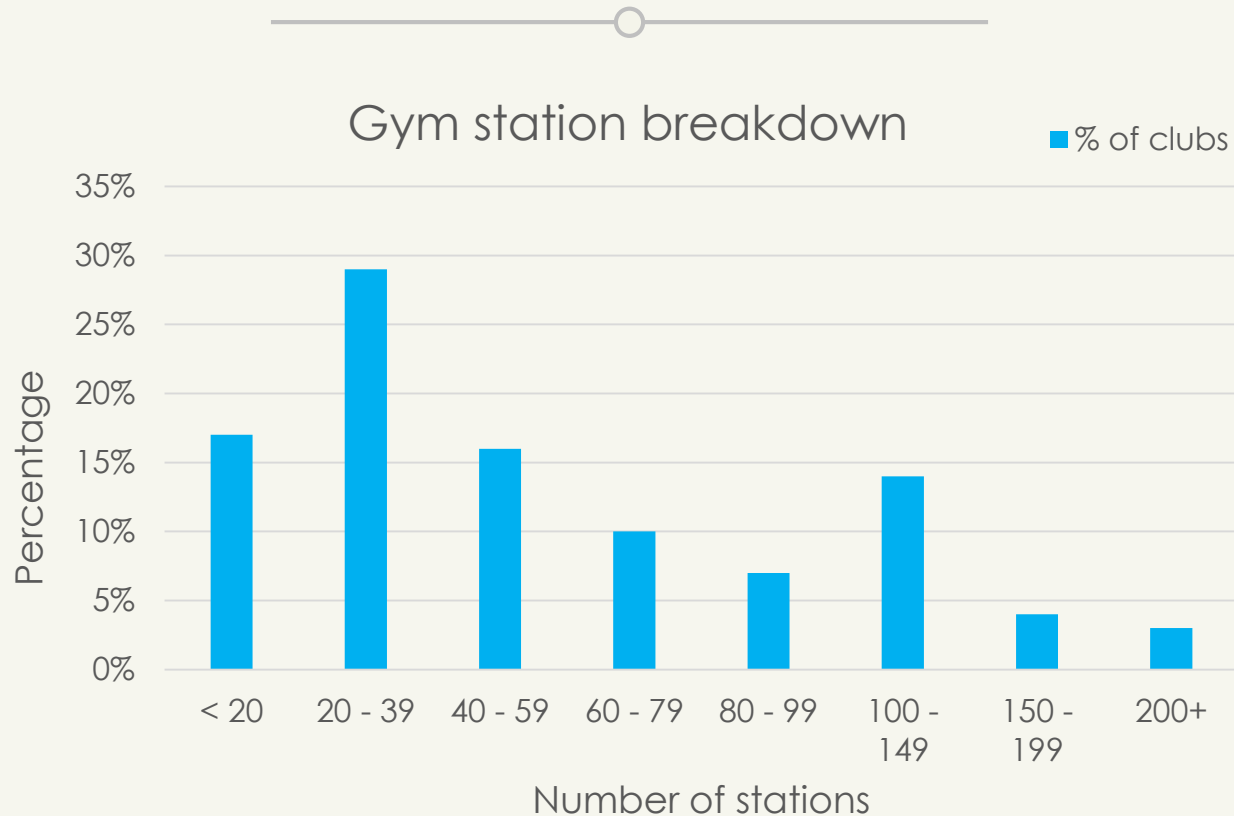
Member penetration rate has increased 8% in the last 12 months – pushing it beyond 9% for the first time ever.

UK Clubs by Region

How do the clubs vary by region?

	% members	% clubs	Index
London	19	13	146
North West	14	12	116
South East	13	15	87
West Midlands	9	8	112
Eastern	8	9	89
Yorkshire & Humber	8	9	89
Scotland	7	6	117
East Midlands	6	7	86
South West	6	10	60
North East	4	4	100
Wales	3	4	75
Northern Ireland	1	2	50

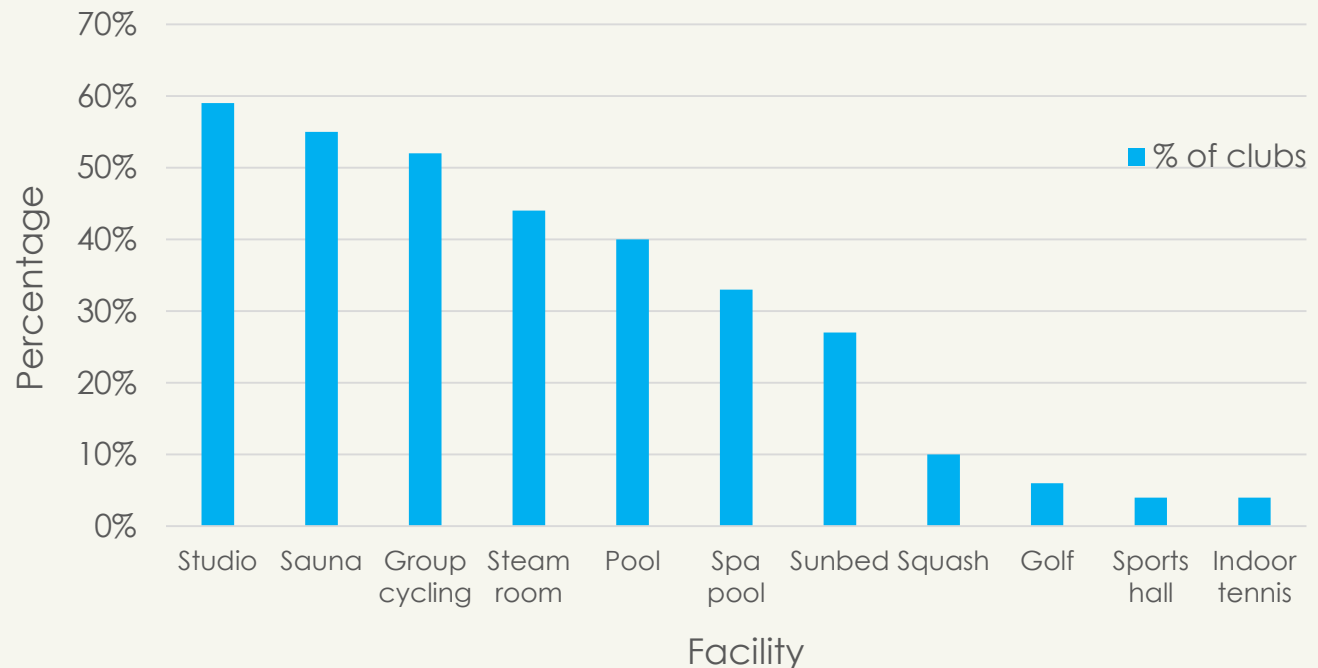
Stations and Facilities



UK gyms have on average 62 stations, but as functional fitness becomes more popular, gyms will likely favour functional space and equipment over CV and resistance kit.

Stations and Facilities

Gym facility breakdown



With 450 clubs now in the low cost sector and representing 12% of the UK private market they're starting to affect the overall facility mix as studios are the only health club facility to have seen an increase.

Health Clubs

Low cost clubs

- The rise of the low cost club
 - The fastest growing clubs are nearly all low cost - there are now 450, a 41% increase in the last 12 months
 - On average, low cost clubs charge £18.77 per month, 54% less than the UK average, but their membership numbers are 159% above the UK average
 - Low cost clubs now account for 32% of the UK's private membership
 - Low cost clubs have also led the digital transformation of the health and fitness sector, giving them a more innovative edge over competitors

Insight

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Gyms

Public

3.37m

people are members of a
public health club

5.2%

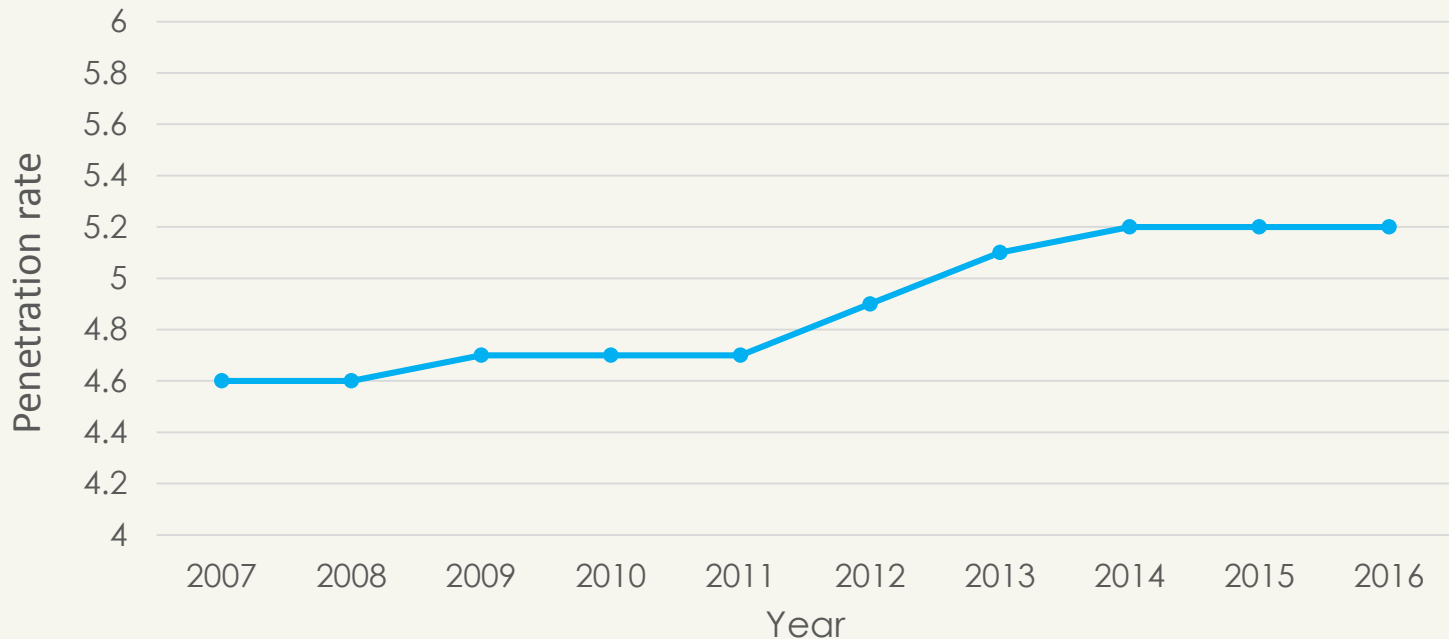
UK adult penetration rate

Public Gyms

Penetration growth



Penetration rate: 2007 - 2016



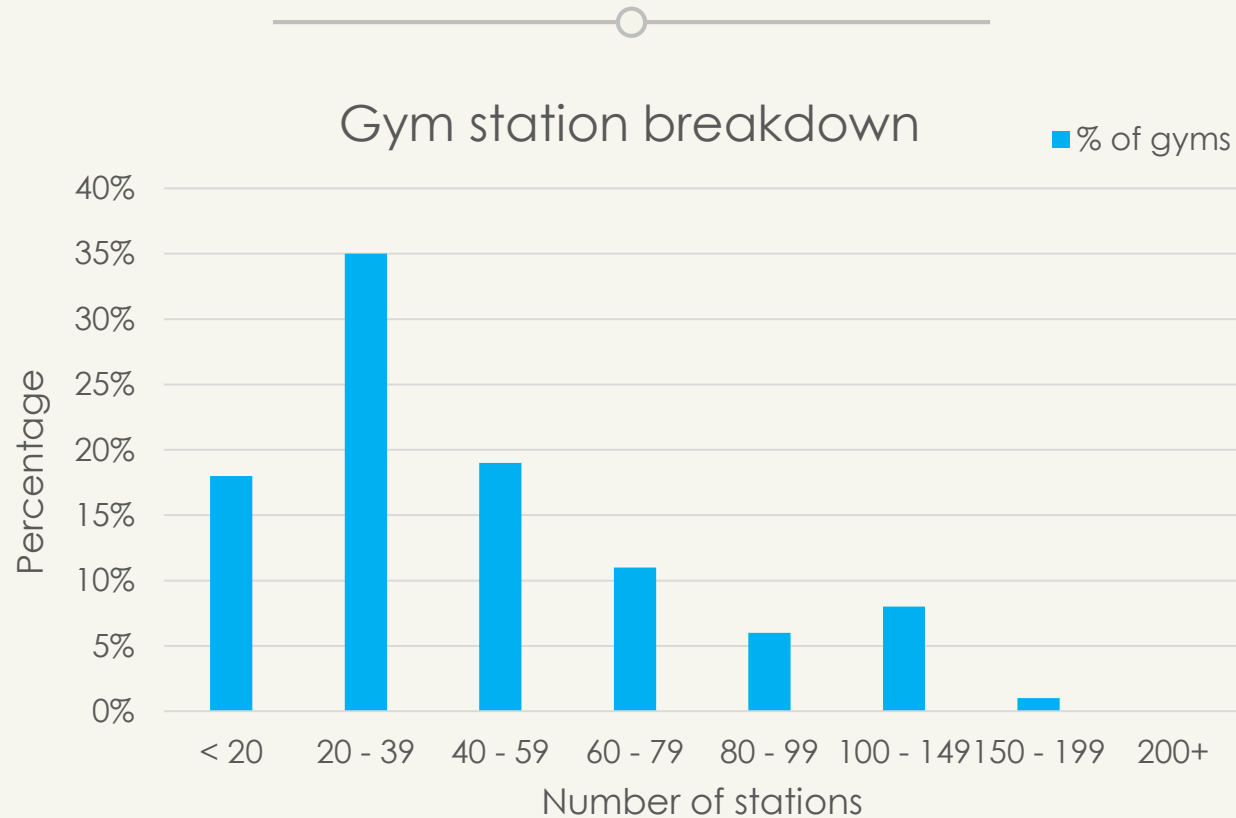
The public gym sector has seen a steady increase in the years from 2007 – 2014, climbing to a penetration rate of 5.2% which has stabilised over the last 3 years.

UK clubs by region

How do the gyms vary by region?

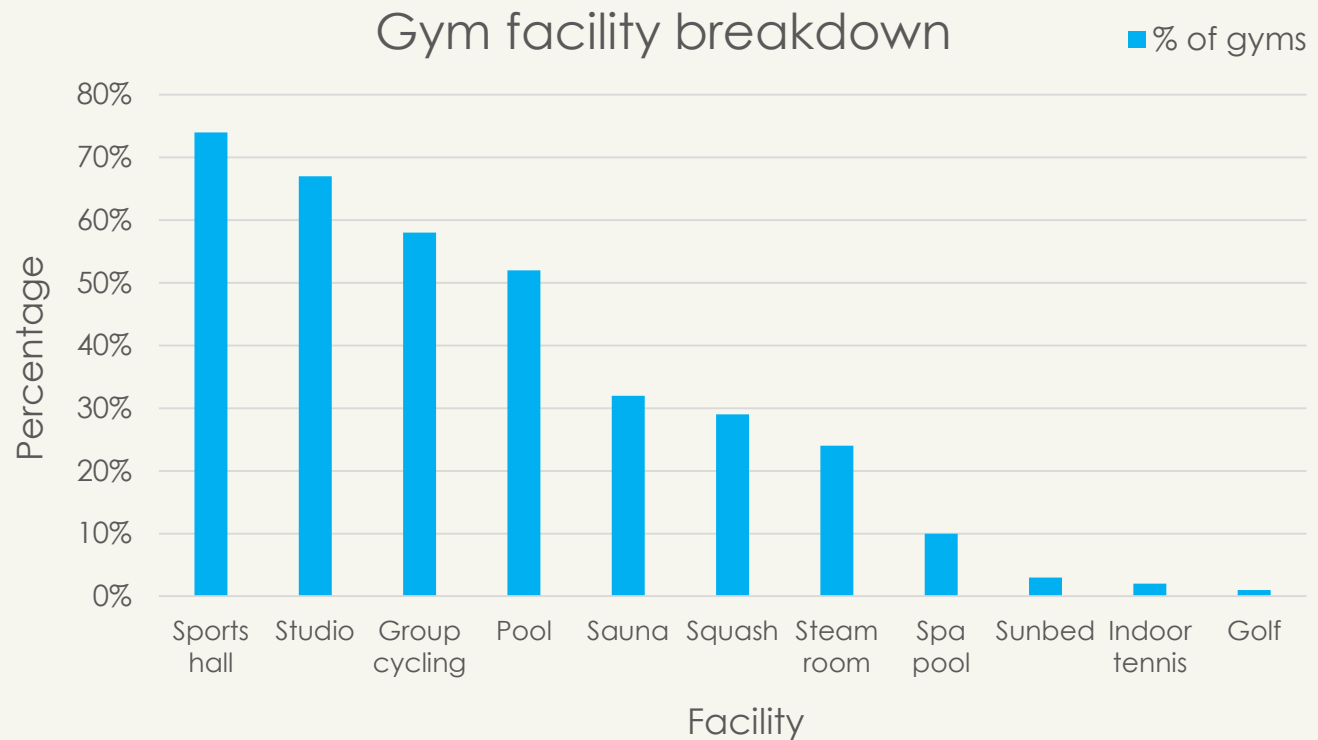
	% members	% clubs	Index
South East	14	13	107
London	14	10	140
North West	10	11	91
Scotland	10	12	83
Eastern	9	9	100
South West	8	10	80
West Midlands	7	8	87
East Midlands	7	7	100
Yorkshire & Humber	7	7	100
Wales	5	6	83
North East	4	5	80
Northern Ireland	3	3	100

Stations and Facilities



The average number of gym stations at a public gym is 46, with over 45% of gyms having more than 40 stations.

Stations and Facilities



The facility mix has remained similar in the last 12 months, only studios saw a significant increase of 5%, reflecting how important offering classes to consumers is for gyms.



For More Information

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