

FOR IMMEDIATE RELEASE FEBRUARY 2012

## Health and Fitness Market Report - Focus on Clubs and Equipment - UK 2012-2016 Analysis

New AMA report reviews the UK health and fitness market and considers future prospects.

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A brief summary of the report is included on the following page.

Priced at £675, the report is currently available from AMA Research Ltd, Telephone 01242 235724 or e-mail at [sales@amaresearch.co.uk](mailto:sales@amaresearch.co.uk).

### **Editors Note:**

Attached is a summary of the report. Please use brief extracts if you wish, **but we would request that references to company market shares are not published without our prior permission.**

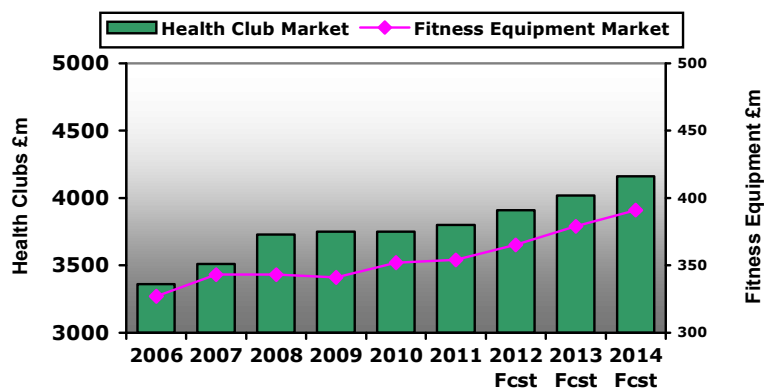
If you would like to receive an editorial review copy or would like to speak to an author of this report, please contact Andrew Hartley or Chris Moore on (01242) 235724.

Please include our web address and telephone number on any review printed, it would also be appreciated if a copy of the review could be forwarded to AMA Research. Thank you.

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# Health and Fitness Market Report – Focus on Clubs and Equipment UK 2012-2016 Analysis

## Fitness Equipment and Health and Fitness Clubs UK Market Size and Forecasts 2006 – 14 (£m)



The health and fitness industry has demonstrated a variable performance over the past 5 years or so. It is estimated that the UK market for **health clubs** including both the private and public sector was worth **£3.8bn** in 2011, while the **fitness equipment** market, covering both commercial and in-home applications, was worth an estimated **£354m**.

Both the health club market and the market for fitness equipment can be considered mature and, as such, are expected to display moderate growth at

best. As shown in the chart, the performance of the fitness equipment market has largely mirrored the performance in the health clubs market since 2006. However, there are differences.

The health club market continued to grow strongly until 2009, buoyed by the local authority, corporate and wellbeing sectors, before demand was negatively affected by falling disposable incomes and rising unemployment. In addition, competition intensified with a number of new budget operators entering the market, pushing membership prices down and leading to a relatively high level of corporate activity. In 2010, the health and fitness club market experienced a first year of zero growth in more than a decade, although the market value is estimated to have returned to growth in 2011 - albeit at a low rate.

The fitness equipment market, on the other hand was affected early in 2008 by a fall in demand with health clubs postponing major refurbishment projects and the rate of new club openings falling substantially. This situation continued until 2009 leading to a fall in market value during the year. While the health and fitness club market remained flat, the commercial fitness equipment market saw a significant increase in revenues in 2010 as health clubs implemented refurbishment programmes in an attempt to attract more members.

Another positive influence on the market at this time was the emergence of a new health club segment aimed at the lower end of the market. The rate of development in this segment has been high during 2010 and 2011, boosting fitness equipment revenues as a number of large projects came on stream. Health club revenue, however, has not greatly benefited from this as membership prices are much lower than for traditional clubs and in many cases, those joining budget clubs were already members of a medium or premium segment club.

There has been a significant amount of **product development** in the market in recent years, which has benefited the market. Much of the new development has been undertaken with the aim of increasing participation in sports and fitness, with an increasing range of new products aimed at children, young people and disabled persons becoming available.

Within the commercial sector, product development has also been centred on the **integration of technology** within equipment and more personal entertainment choices. Features such as iPod and USB connectivity and interactive screens with 'virtual trainer' and other advanced software included are becoming a common sight in health clubs.

The outlook for both of these related markets in the medium term is positive. These are mature markets, so growth rates will be limited; however, there is strong underlying demand for health and fitness facilities and, therefore, fitness equipment. It is estimated that by 2016, the market for health clubs will have reached a value of **£4.4bn** with the fitness equipment market forecast to be worth an estimated **£403m**.

AMA Research's report "**Healthcare and Fitness Market Report – Focus on Clubs and Equipment - UK 2012-2016 Analysis**" is available in hard copy or electronic format for £675 and can be ordered online at [www.amaresearch.co.uk](http://www.amaresearch.co.uk) or by calling 01242 235724.