Health and Fitness Market Report - Focus on Clubs and Equipment - UK 2016-2020 Analysis

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Introduction and Overview
The 4th edition of the 'Health and Fitness Market Report - Focus on Clubs and Equipment - UK 2016-2020 Analysis' has been published by AMA Research. The report covers the health and fitness club sector (private and public), as well as the commercial and home fitness equipment markets. The report contains original input and a detailed assessment of the market and represents excellent value for money to companies in this industry or considering entry.

Key content covered:

- Private Sector Health & Fitness Clubs - Market size and key trends, mix by in-hotel and stand-alone, Mid and Premium sector, assessment by volume of members, number of clubs and revenue.
- Public Sector Health & Fitness Clubs - Market size and key trends, assessment of private leisure management contractors, in-house managed and trust managed facilities, analysis by number of members, sites and revenue.
- Commercial Fitness Equipment - Market size and key trends, main suppliers and brands, specialist suppliers, mix between CV and strength training equipment, imports and exports, and distribution mix.

Key areas of insight include:

- Significant changes within the private health clubs sector - growth of low-cost clubs.
- Impact of increasing competition and changing technology.
- Growth in niche market segments.
- Market forecasts in 2016 and through to 2020.
- Detailed market data and insight on the health and fitness market by AMA Research, a leading UK provider of
Some of the companies included:

The Market
- Total market size - analysis by value 2010-2015 with forecasts for 2016-2020, key factors influencing market e.g. increased awareness of health & fitness, industry consolidation and economic climate. Commentary on recent, current and likely future performance.
- Assessment of the market by private and public sector revenue, analysis of the number of facilities in overall terms.
- Key market influences - consumer spending & confidence, increased consumer awareness of health and fitness issues, participation rates in sports, games & physical activities, changing technology, campaigns to encourage sports & fitness etc.

Health & Fitness Club Market
- Analysis of 4 key market sectors - private stand-alone health clubs, hotel based health clubs, private and publicly managed local authority facilities - sector shares, trends.
- Market trends & influencing factors - slowdown in development of private fitness facilities; development of niche markets; increasing competition; corporate and local authority sectors; new exercise trends; new product development.
- Assessment of market - development of new club outlets, by membership numbers, and by key market sector - in-hotel and stand-alone development, independent versus chains, together with Premium, Mid-market and Value market analysis. Growth of low-cost gyms - new operations in market, likely future changes.
- Key operators and market shares - changing market structure - leading providers and brands, private sector groups, independents, hotel chains, etc. Company profiles, acquisitions etc.
- Future prospects 2016-2020 and opportunities for the private and public sectors.

Commercial Fitness Equipment Market
- Market Trends & Influencing Factors - influence of local authority health and fitness sectors, development of niche markets; new exercise trends; new product development, role of imports etc.
- Impact of Product Innovation & Equipment Upgrading - share mix between strength and CV equipment, market drivers,
future changes/trends, changing technology.

Key suppliers - leading equipment suppliers, share estimates, sector strengths, company profiles etc.

Future prospects and opportunities for the commercial sector.

Home Fitness Equipment Market


Product Mix - shares for treadmills, bikes, multi-gyms, free weights etc. key trends in recent years, growth sectors etc.

Key suppliers and market shares - leading suppliers, share estimates, sector strengths, company profiles etc. Distribution channel analysis - growth sectors/new entrants etc.

Future prospects and opportunities for the sector.

Report Summary

The health and fitness industry in general has demonstrated a good performance over the past 5 years. The health and fitness club market has experienced a good level of growth since 2011 at 2-3% per annum, with increases in overall total revenue for the sector based on rising levels of membership and in the number of new public and private facilities. The fitness equipment market has seen similar growth of 2-3% per annum. Both markets have benefited from an increased awareness of fitness as an essential component of a healthy lifestyle. This has been achieved through a variety of ways including an increasing focus on sport and fitness in the media and media attention around the rise in obesity levels and campaigns focused around getting young people active.

The UK health and fitness club market continued its steady expansion throughout 2015 with a significant increase in the number of fitness facilities - performance was driven by the low cost sector with the key operators progressing with significant development programmes. As competition in the low cost sector has increased, larger operators have often taken multiple gyms in a town or city to secure their customer base. The higher end of the market incorporating country club and spa facilities has also proven to be resilient. Additional services that many gyms are now providing for their members include specific exercise classes, as well as personalised advice on nutrition and diet.

The UK fitness equipment sector grew by around 3% in 2015, compared with the previous year. Sales of fitness and exercise equipment have risen in line with the improving state of the UK economy, which has led to higher spending by both consumers and operators of commercial gyms (e.g. hotels and local authorities). Recent growth has also been driven by the booming low-cost/budget gym sector, and the corresponding increase in demand for fitness equipment. Within both the home and commercial markets, demand is highly susceptible to new trends and ‘fitness crazes’. Recent examples of trends driving the market include HIIT (High Intensity Interval Training), Zumba classes and use of Vibration Plate equipment. More recently, there have been moves towards equipment that can replicate the feeling and sensation of exercising outdoors, as well as products geared towards training in groups. The UK market for fitness equipment is relatively mature, with many well-established leading suppliers. As a result, the market features a number of well-known brands, although in recent years the growth of lower-cost imports has eroded their position.

The outlook for both of these related markets in the medium term is for modest growth. The health club market is expected to remain in a state of flux as low-cost health clubs continue to gain market share from established medium segment health clubs, leading to lower revenue fees across the industry. The outlook for the commercial fitness equipment market in the short to medium term is for moderate growth of 1-2% per annum. Although the current expansion and investment programmes pursued by many leading health and fitness club operators suggests demand for equipment will rise, a number of towns and cities are saturated in terms of health and fitness establishments and significant growth is unlikely. The future direction of the commercial fitness equipment market is also likely to depend upon how well low-cost and budget gyms continue to develop their presence. At present, this sector accounts for just 5% of the UK's total number of gyms and health clubs, so there is scope for growth - especially if the economic situation deteriorates as a result of the Brexit vote and
consumers reign in their spending on non-essentials. The outlook for the home fitness equipment is also for moderate growth over the next couple of years, although demand may experience a decrease towards the end of the decade.

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