

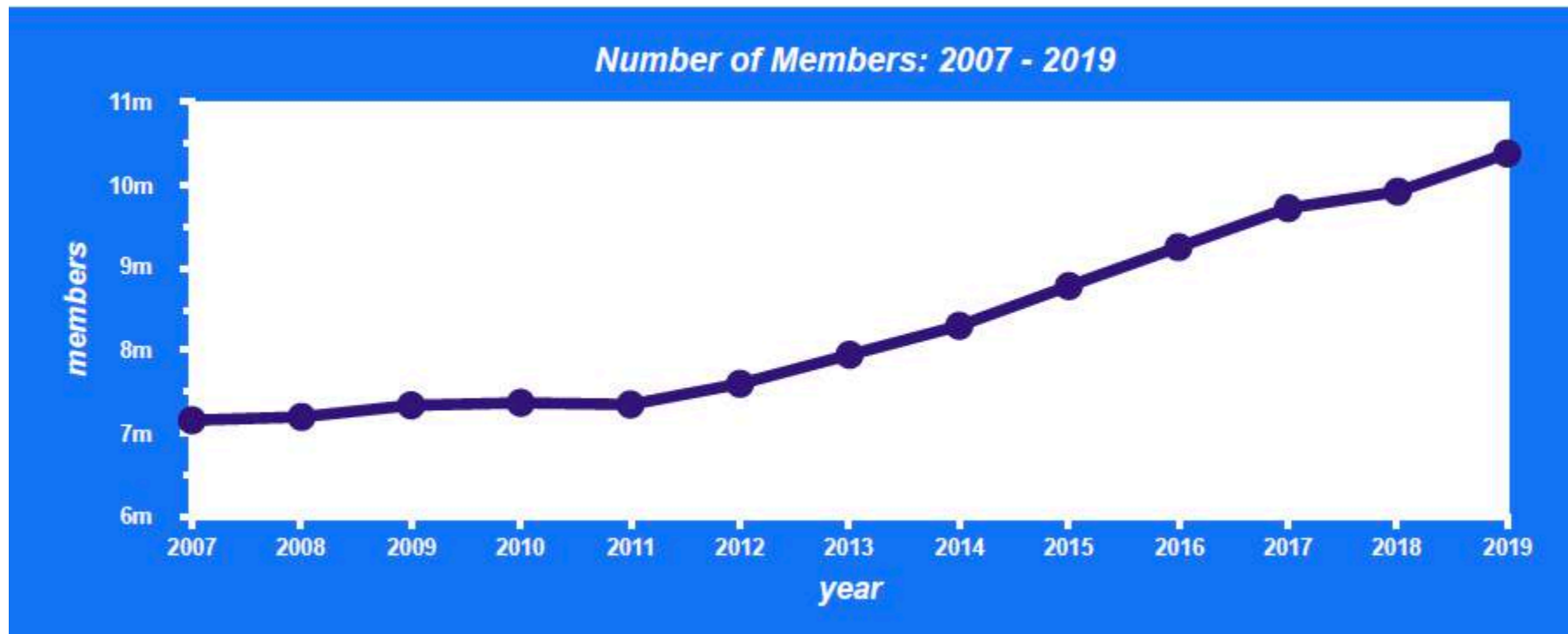
WORLD INDOOR CLIMBING SUMMIT

DAVID MINTON



2019 State of the UK Fitness Industry

Total Market

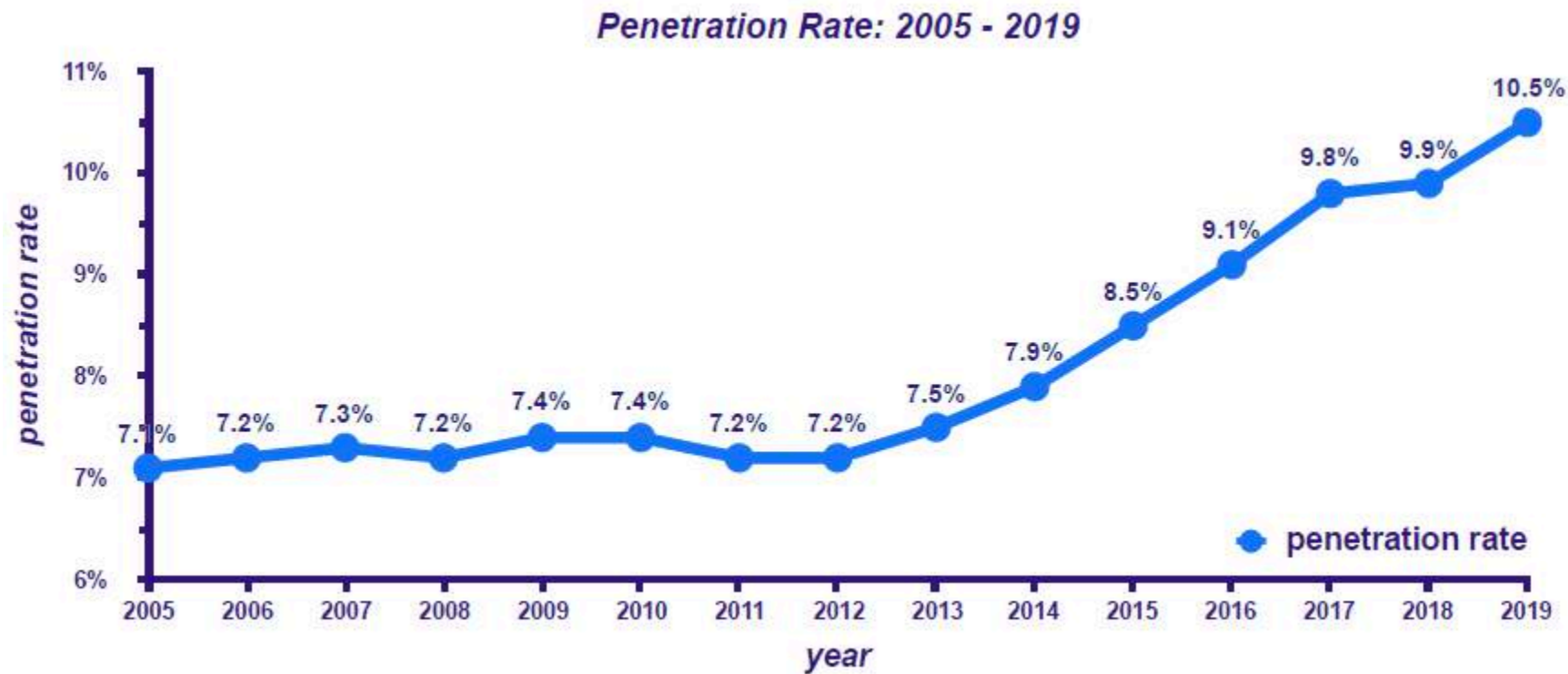


2019 State of the UK Fitness Industry

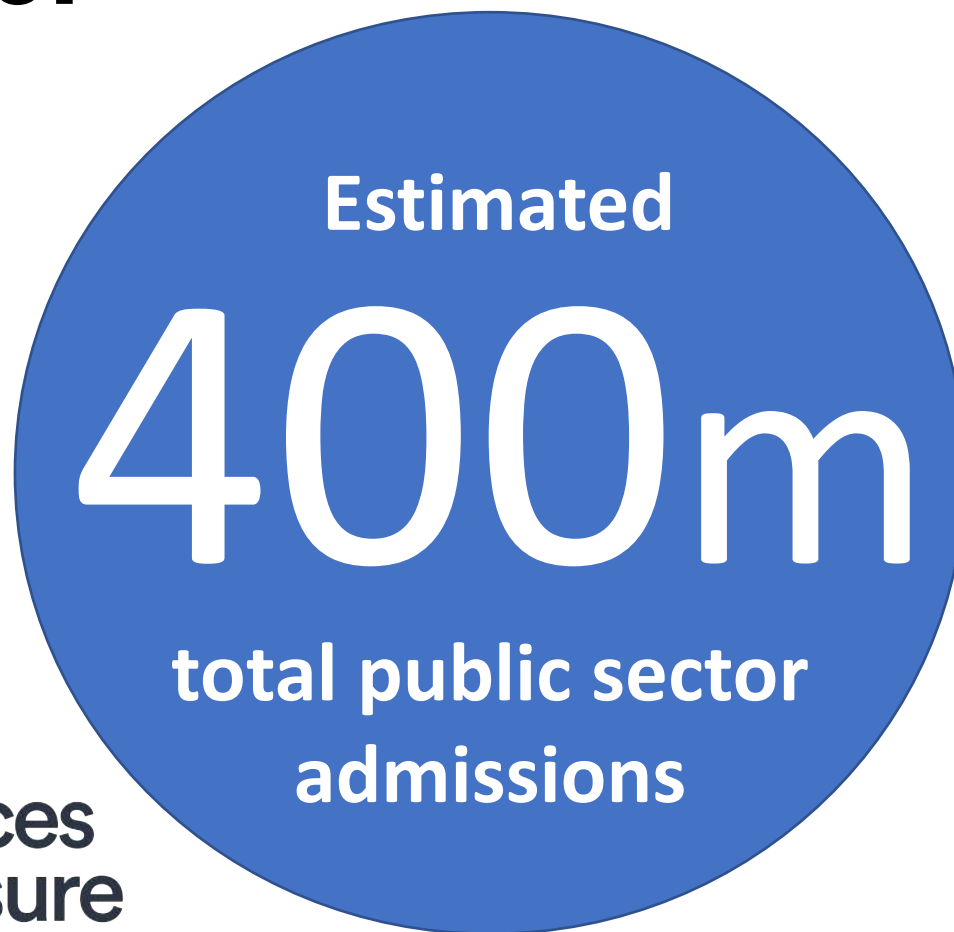
Total Market



2019 State of the UK Fitness Industry Private Sector



Public Sector



everyone
ACTIVE

 **freedomleisure**
where you matter

GLL
better for everyone

 **Places
Leisure**
Part of Places for People

 **Glasgowlife™**

 **fusion**

serco

 **Parkwood
Leisure**

 **highlife**
highland
na gàidhealtachd

Hertfordshire Sports Village

CLIMBING WALL

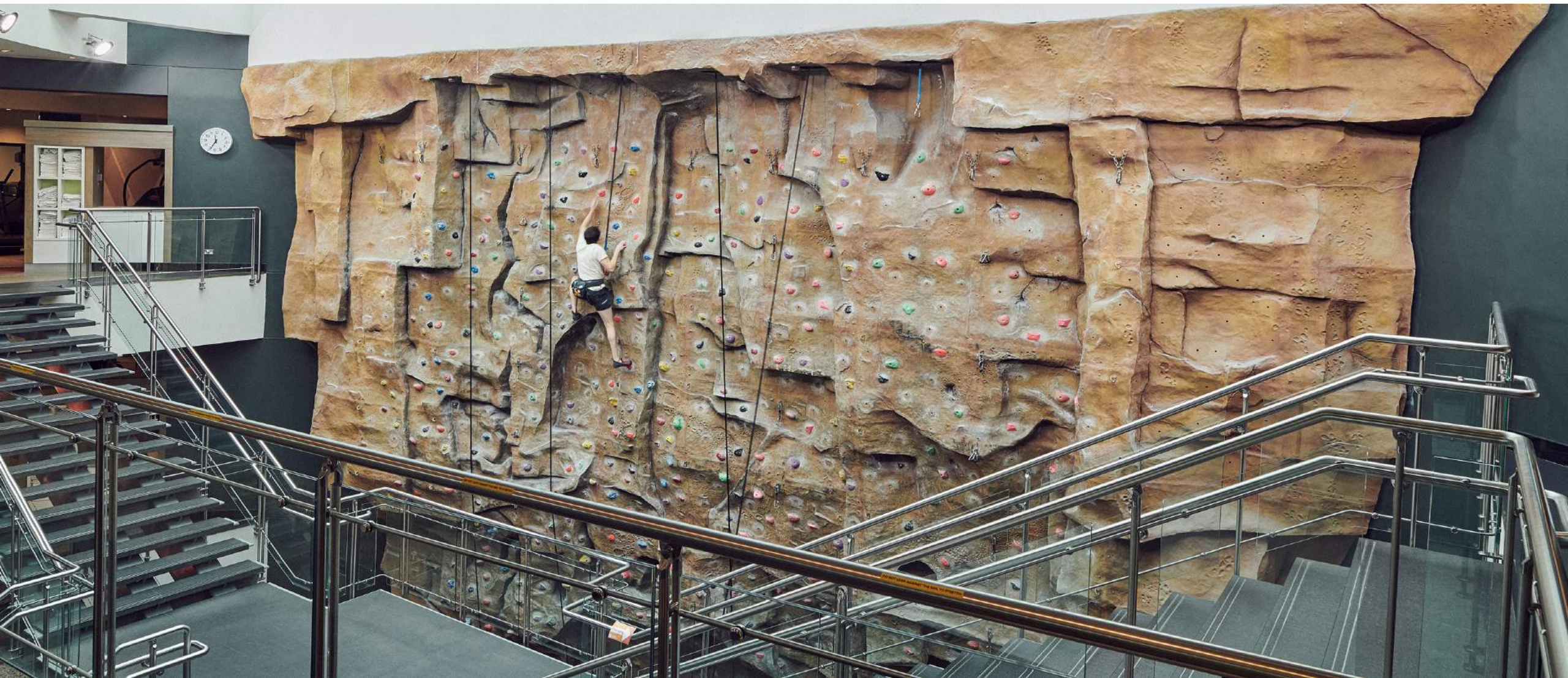


Boulder Hut



- Monthly DD subs of £980 in Feb 2019
- Monthly DD subs of £7,560 in July 2019

Third Space



Low Cost



Aggregators in the fitness industry



classpass



HUSSLE

HEYGYMS

GYMS, HEALTH CLUBS & FITNESS CENTERS

GO
MAMMOTH



FITICKET

move^{GB}



PlaySport



mumsnet
by parents for parents

SchoolHire



VINT

fibodo



ZENREZ



GYMPIK



Gympass



imin

Boutiques



REBEL



BARRY'S



BOOTCAMP
PILATES

KOBX

RIZE



BLOK

psyche
london



HEARTCORE



CrossFit



D I M E



Another
—Space

FIERCE GRACE

MANOR



THE
FOUNDRY.

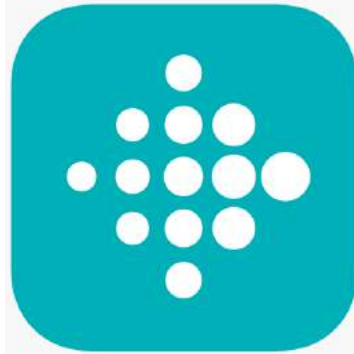
Apps



Runtastic



MyFitnessPal



Fitbit



Strava



Map My Ride



Sweat



Nike+ Run Club



SwimIO



Runkeeper



Map My Run



Fitness innovation drivers

The at-home fitness revolution

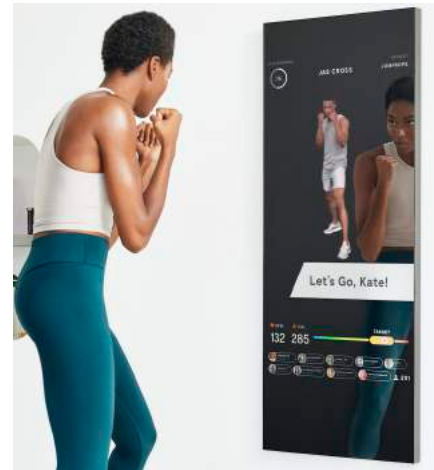
Bundling hardware and software



 PELOTON®



hydrow
BY CREW



MIRROR



TONAL

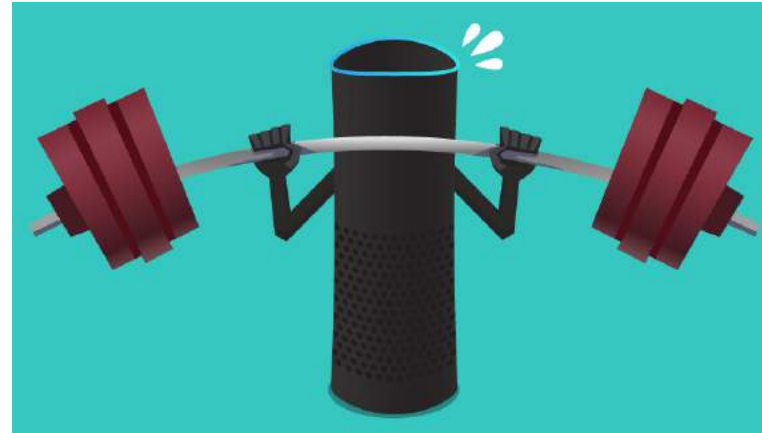
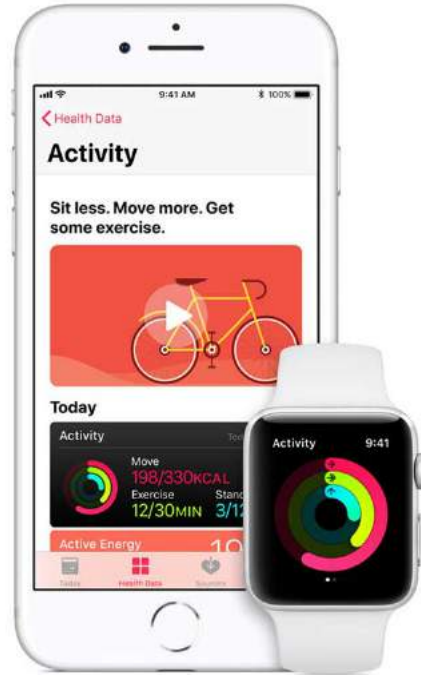


LES MILLS

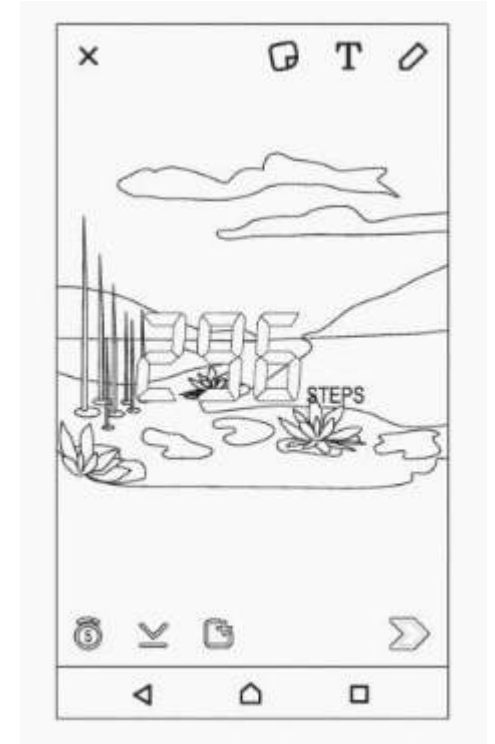
Big tech pushes into fitness




Google Fit

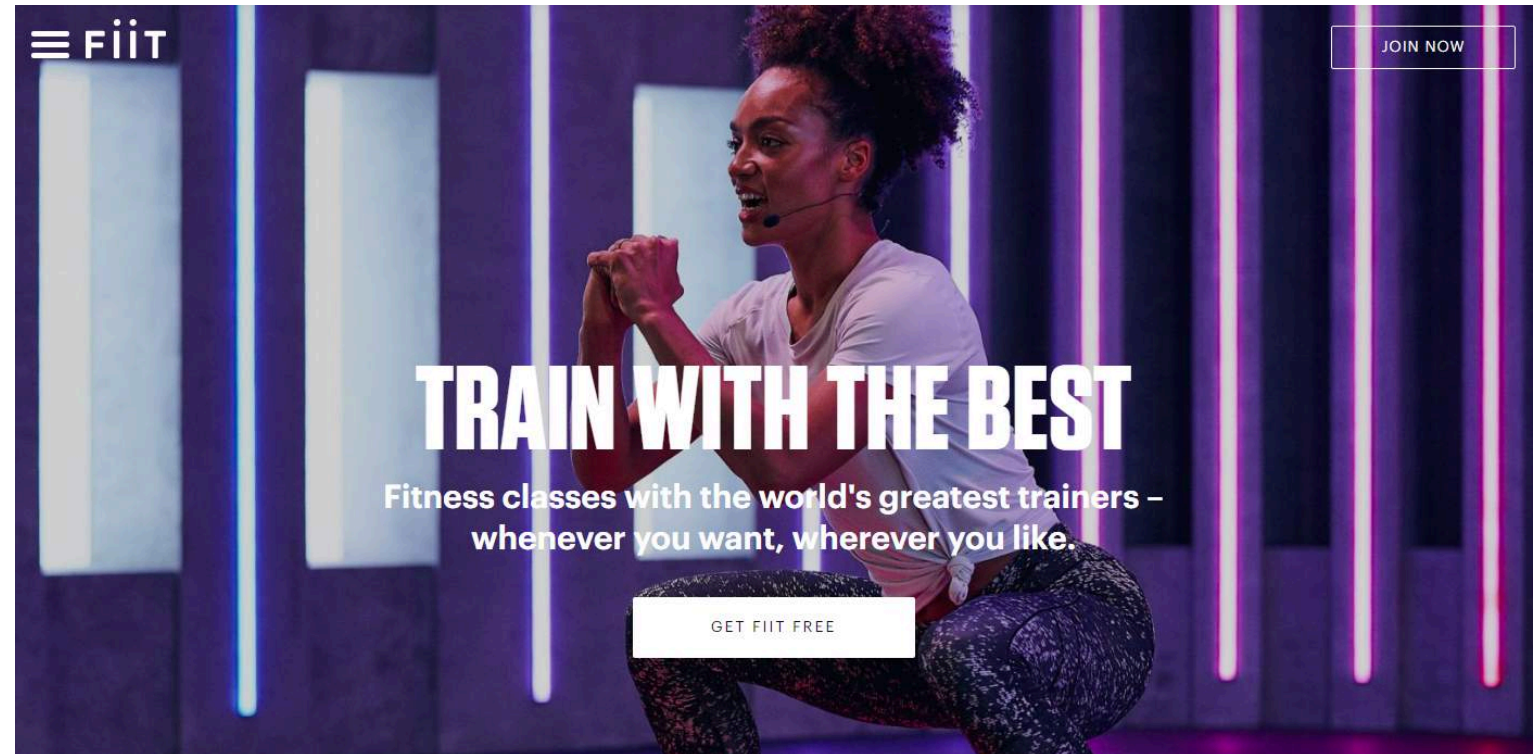


amazon alexa



Live-streaming and wearables offer end-to-end fitness

- London-based Fiit offers an at-home coaching platform that connects to users' TVs to stream workouts from personal trainers.
- Fiit also provides an accompanying wearable tracker.



Re-inventing the gym

- Tech-enabled fitness such as virtual gyms and apps
- Impact on the environment



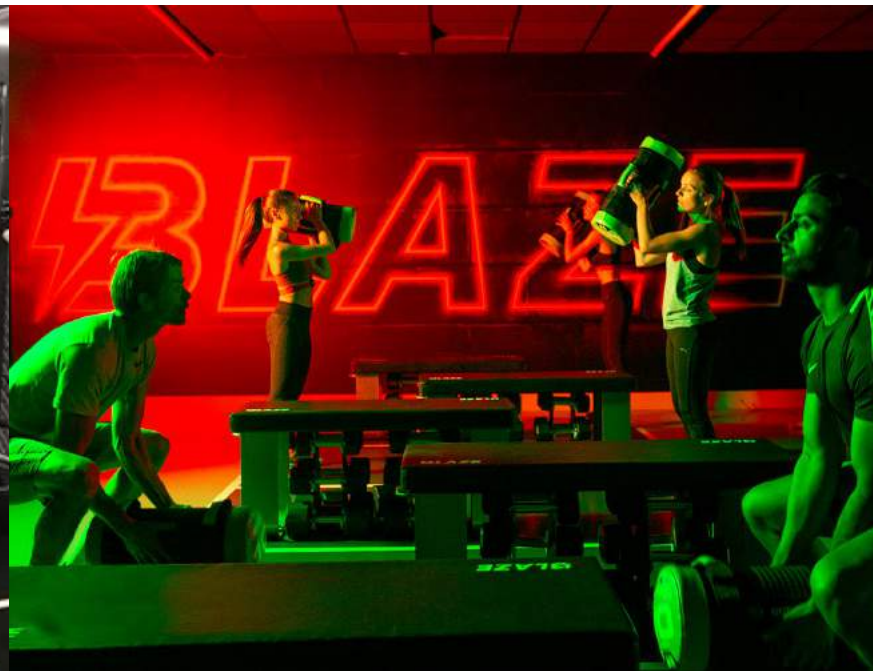
Legacy brands are disrupting themselves

- **Boutique style classes**

e.g. David Lloyd Blaze, Speedflex @ Bannatyne, The Yard Energie Fitness

- **Body scanning**

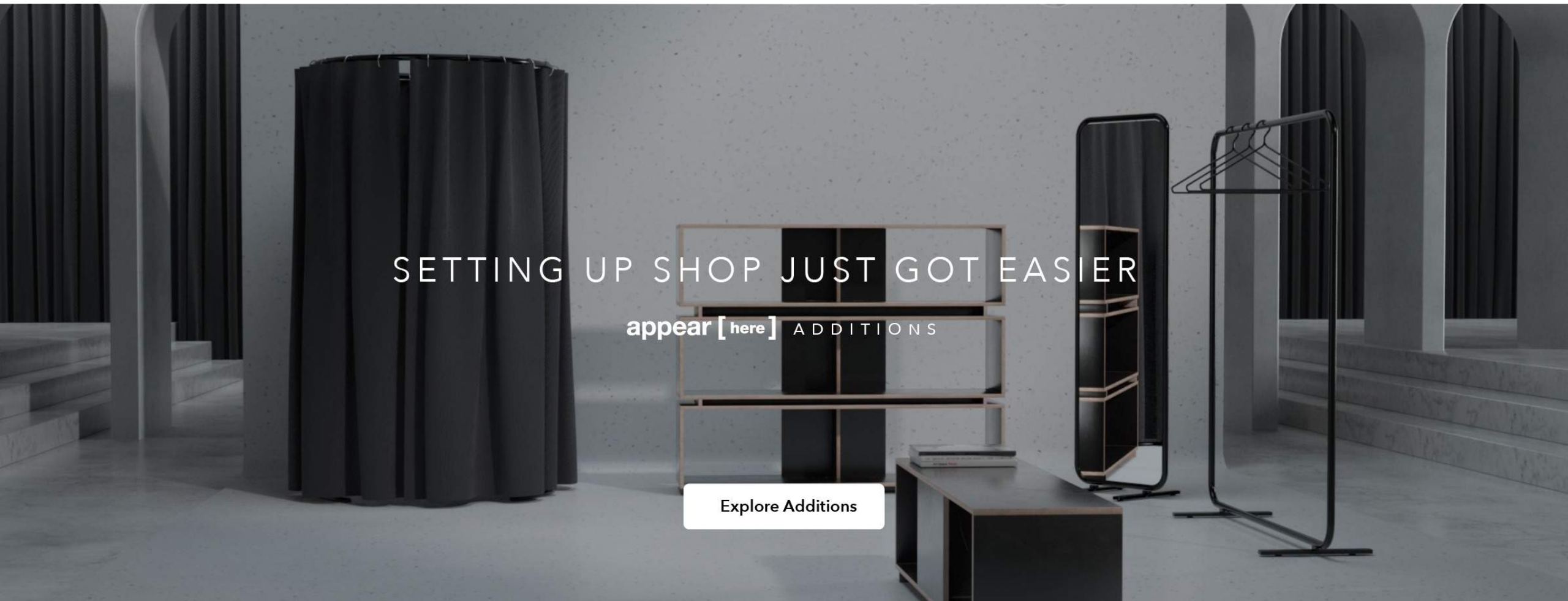
- **Digital platforms**



Can in-store gyms help save the high street?



appear [here] connects landlords with brands





**GOOGLE
DEFINITION**

BOUTIQUE
noun

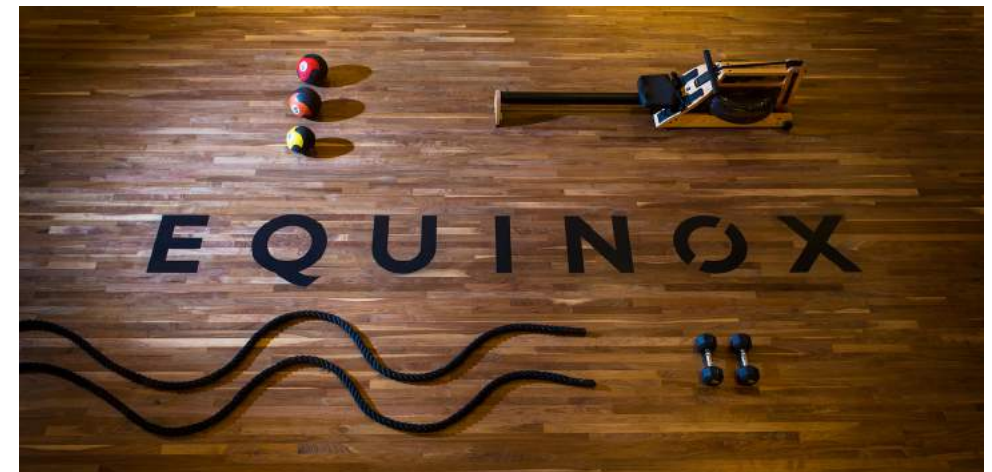
**"a business serving a
sophisticated or
specialised clientele"**

LeisureDB

4

Importance of talent

July 2018 - Equinox, the high-performance lifestyle leader, along with SoulCycle, the leading lifestyle boutique studio, announced the development of a talent management agency exclusively representing their leading, market-defining fitness talent. The management agency will launch with a network of employees from across the brands' global portfolio of Fitness Clubs and Studios.



Using data to drive growth



**The golden age of
fitness...**

2019 State of the UK Fitness Industry

total number
of sites
passes

7,200

total
membership
breaks

10m

total
penetration
reaches

15.6%

total market
value
exceeds

£5bn

David Minton



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@leisuredb 