

David Minton

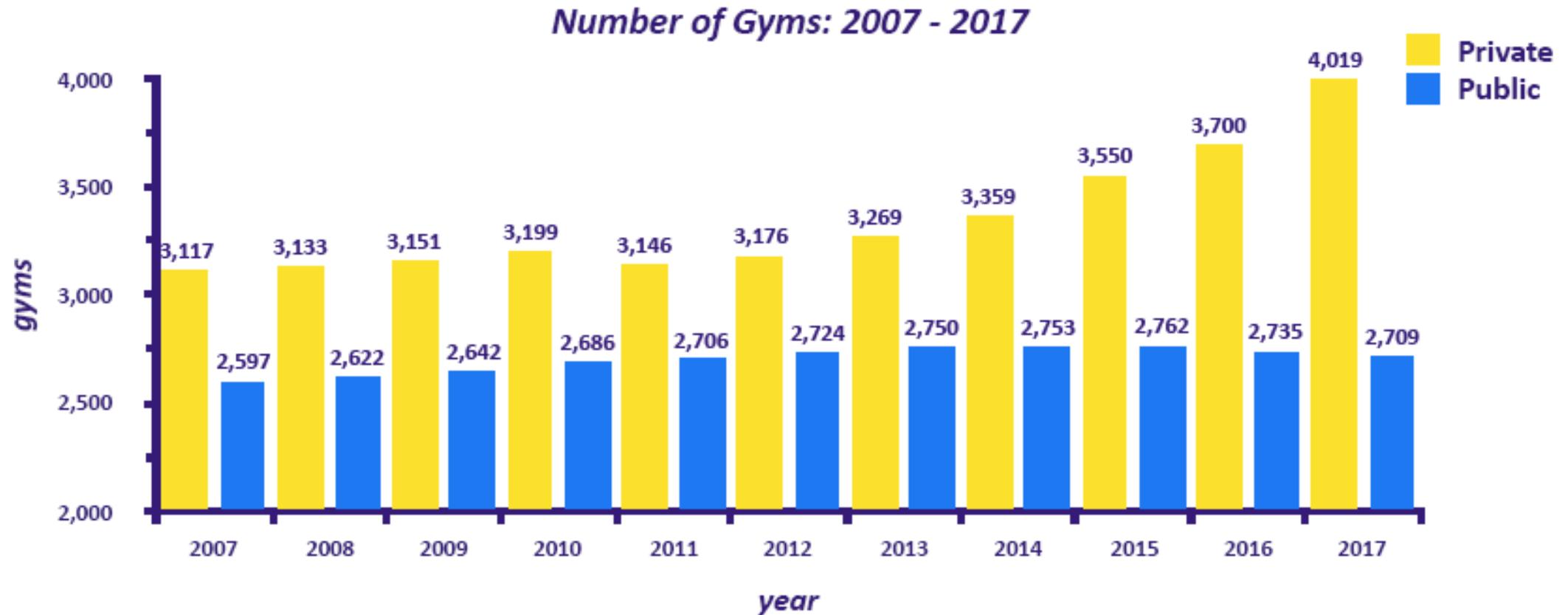


SASAKAWA SPORTS FOUNDATION

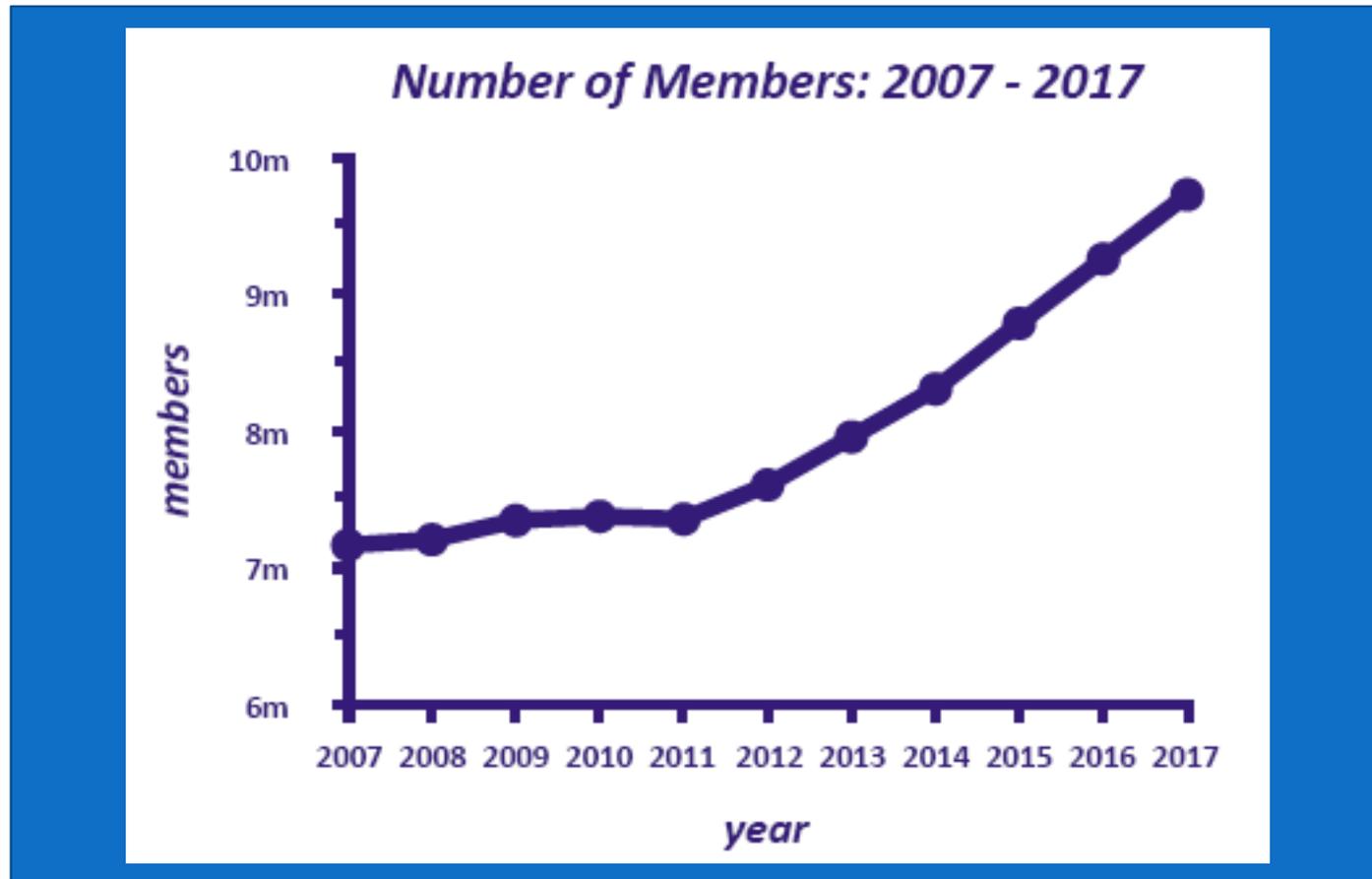
2017 State of the UK Fitness Industry



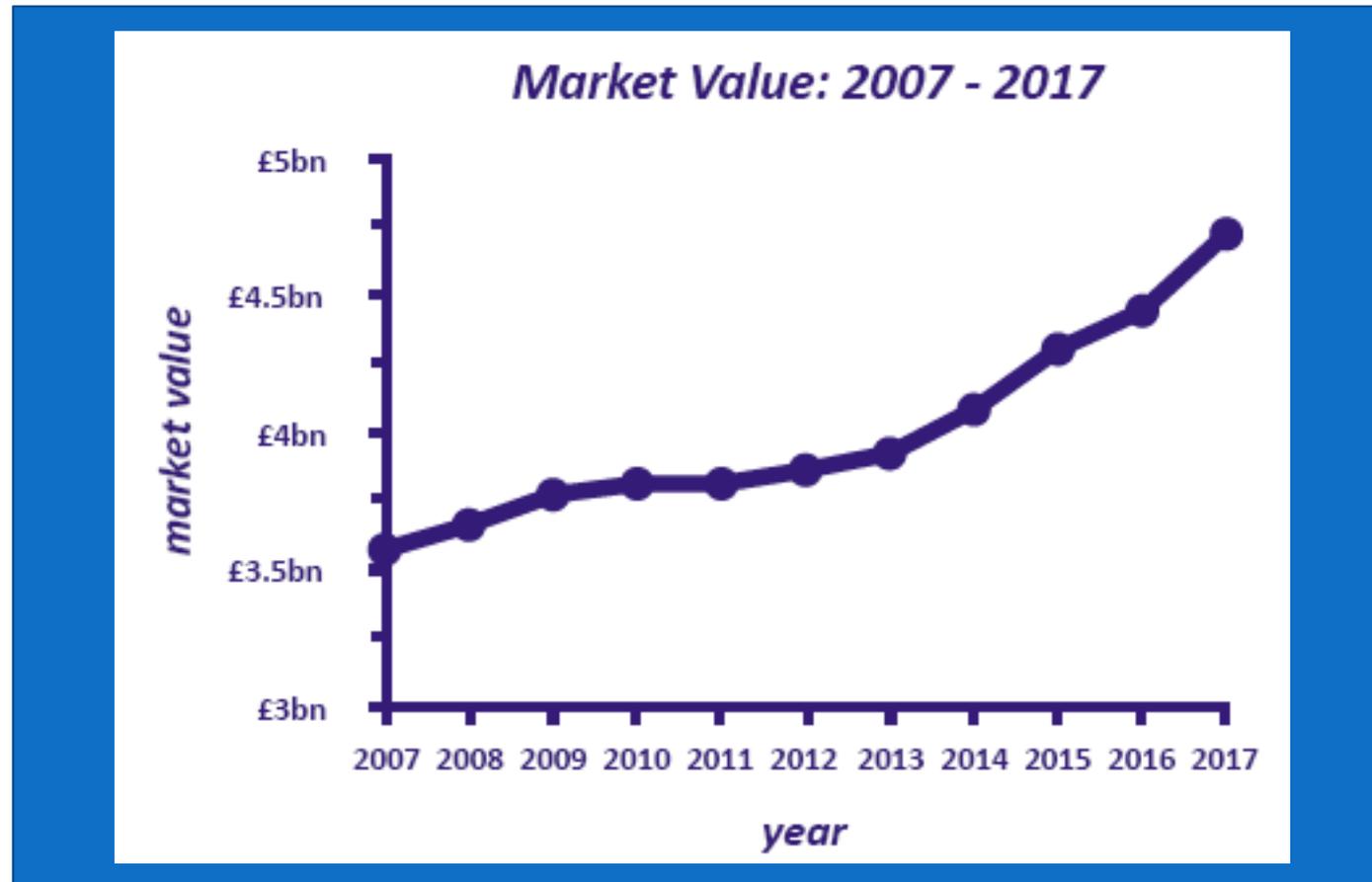
2017 Number of Gyms



2017 Fitness Members



2017 Market Value



2017 Private Penetration Report

Penetration Rate: 2005 - 2017



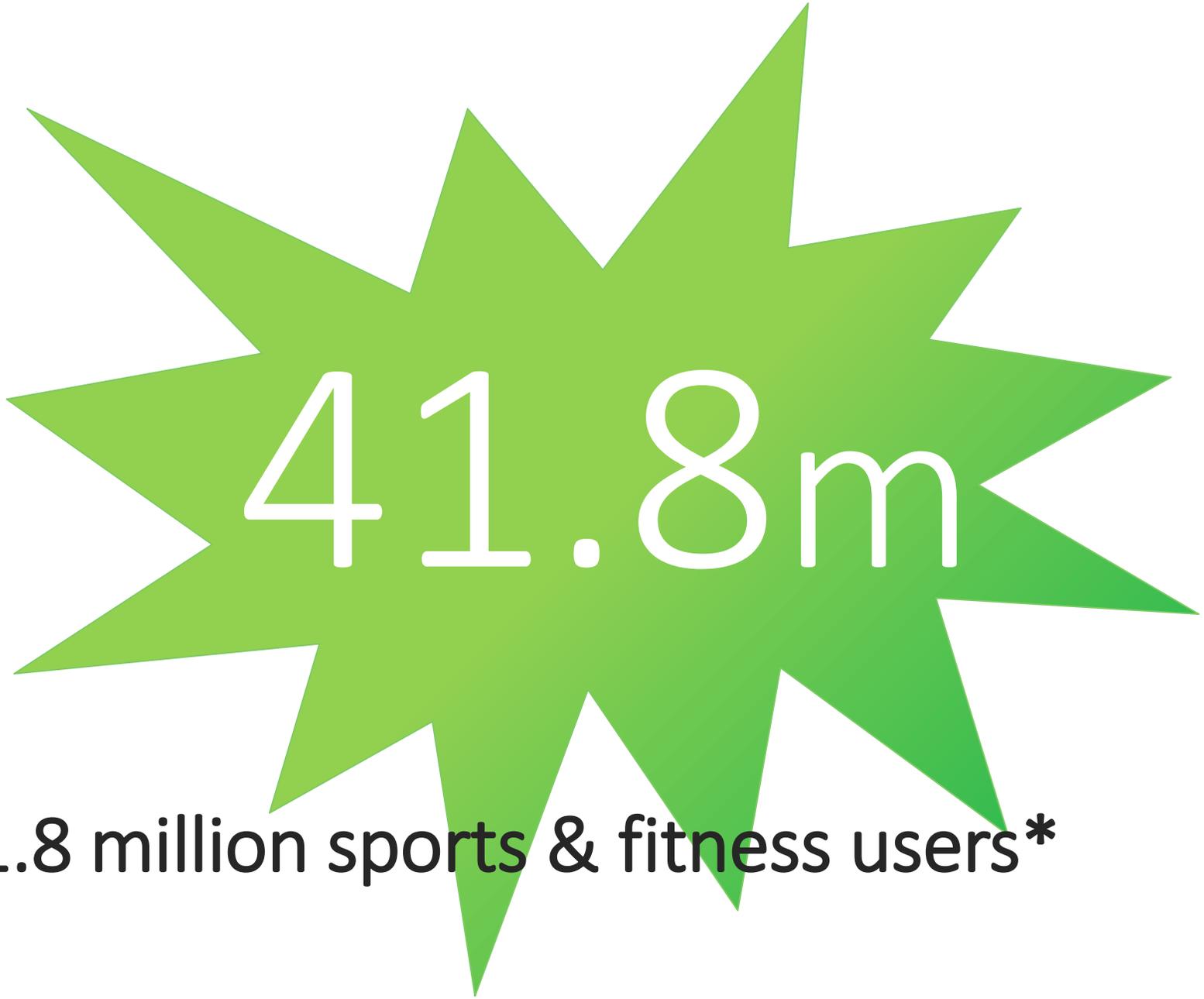
Japanese Health Club Market

**JAPANESE CLUB MARKET LARGEST IN ASIA-PACIFIC
PARTICIPATION AROUND 3%**

REGION	TOTAL INDUSTRY REVENUE (USD)	TOTAL # OF CLUBS	TOTAL # OF MEMBERS
Asia-Pacific			
Japan	\$5,158,000,000	5,979	4,160,000
Australia	\$2,555,000,000	3,351	3,480,000
South Korea	\$1,880,000,000	6,839	2,030,000
China (Mainland)	\$2,078,000,000	2,670	3,880,000
Taiwan	\$369,000,000	185	580,000
Hong Kong	\$373,000,000	338	298,000
India	\$669,000,000	3,800	950,000
New Zealand	\$354,000,000	712	500,000
Singapore	\$288,000,000	328	230,000
Thailand	\$192,000,000	1,241	310,000
Indonesia	\$187,000,000	1,716	320,000
Malaysia	\$153,000,000	744	250,000
Philippines	\$133,000,000	783	230,000
Vietnam	\$27,000,000	2,325	137,500

GLL

better for everyone

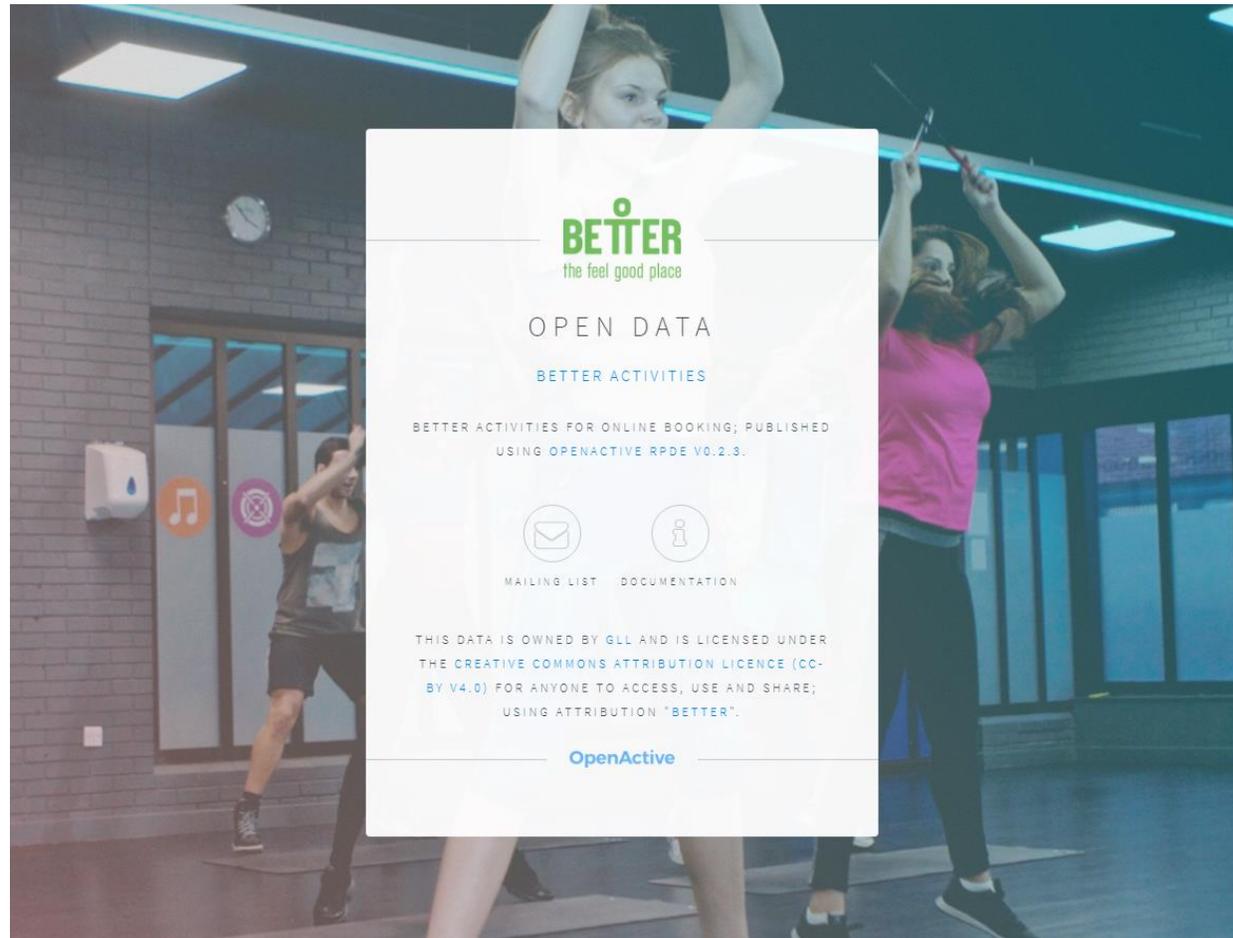


41.8m

In 2016, GLL had 41.8 million sports & fitness users*

**(excluding libraries)*

Open Data



BETTER
the feel good place

OPEN DATA

BETTER ACTIVITIES

BETTER ACTIVITIES FOR ONLINE BOOKING; PUBLISHED
USING OPENACTIVE RPDE V0.2.3.

MAILING LIST DOCUMENTATION

THIS DATA IS OWNED BY GLL AND IS LICENSED UNDER
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OpenActive

Sessions

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https://www.better.org.uk X
Secure | https://www.better.org.uk/odi/sessions.json
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ABOUT OPENACTIVE

We are a group of organisations who believe that open data will help people get active, coordinated by the [Open Data Institute](#).

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CONTACT

We'd love to hear from you. Get in touch at hello@openactive.io.

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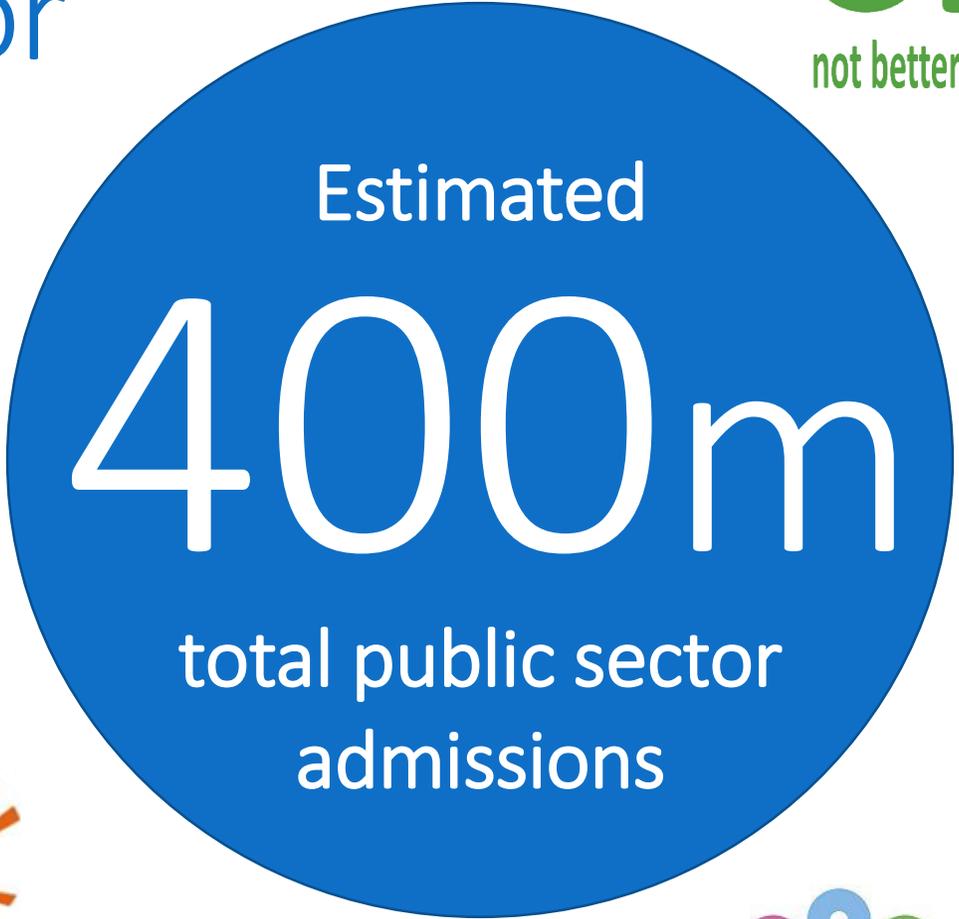
Supported by the [Open Data Institute](#) and [Sport England](#)



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Public Sector



Aggregators of the Fitness Industry



CLASSPASS



VINT



SchoolHire



imin

strive^{CLUB}



the sweat experience[®]



Boutiques

REBEL

BARRECORE

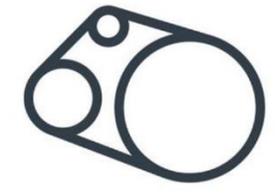
RESHAPE YOUR WORLD

BARRY'S BOOTCAMP

BOOM CYCLE

FUNCTIONAL 45 F45 Training

FRAME



PSYCLE

CrossFit

SPEED FLEX

9 ROUND™ 30 MIN KICKBOX FITNESS

Fitness without boundaries

Fitness without boundaries has an estimated investment of £40 billion

Yet the size of the UK Fitness Market is on £4.4 billion

Estimated Market Value



• £4.7 billion

Source: 2017 State of the UK Fitness Industry Report - The Leisure Database Company

Fitness influencers

Kayla Itsines

Sweat with Kayla

10m women involved



- ▶ Fitness Blender
- ▶ Fitness on demand
- ▶ 3.8m YouTube subscribers



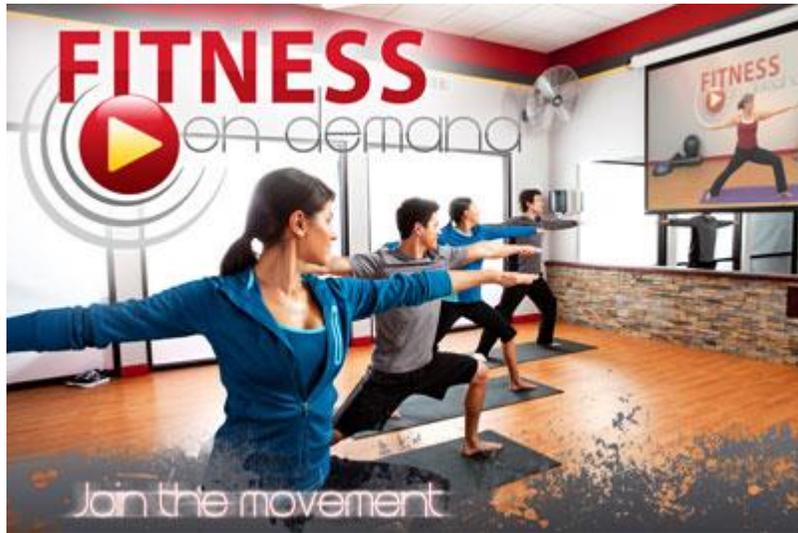
▶ Joe Wicks

▶ The 'Body Coach'

▶ 2.5m Facebook likes



On-demand fitness



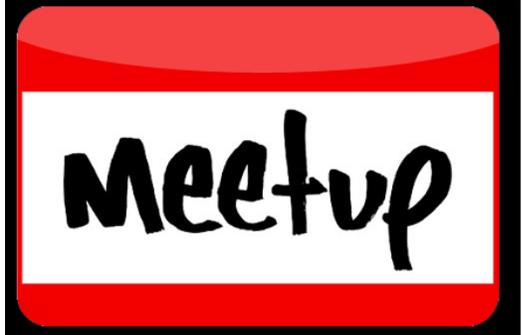
daily  burn

You 

wexer 
VIRTUAL

 BEACHBODY®
ON DEMAND

LES MILLS
ON DEMAND



Apps



Runtastic



MyFitnessPal



fitbit



Strava



Map My Ride



Sweat



Nike+ Run Club



SwimIO



Runkeeper



Map My Run

Fitness trackers



Activewear brands offering free fitness classes in-store

Here's our pick of the best free fitness classes in London.

- Asics Bootcamp. 6.30pm-7.30pm every Wednesday. ...
- Lululemon Run Club and Yoga. Tuesdays, Wednesdays and Sundays, various branches. ...
- Nike+ Running Club and Nike+ Training Club. ...
- Our Parks. ...
- Reebok Fithub. ...
- Sweaty Betty's in-store classes. ...
- Sweat Shop running community.



Buy buttons

LeisureDB's Social Media Fitness Index Q4 2016 report identified Facebook as the fitness industry's number one social media channel

Followed closely by Twitter & Instagram

Retail did \$3.3bn last year using social media 'buy' buttons

Is the fitness industry under utilising the 'buy' button?

Twitter



Nest Learning Thermostat 2.0
fancy.to/l70dng via @fancy

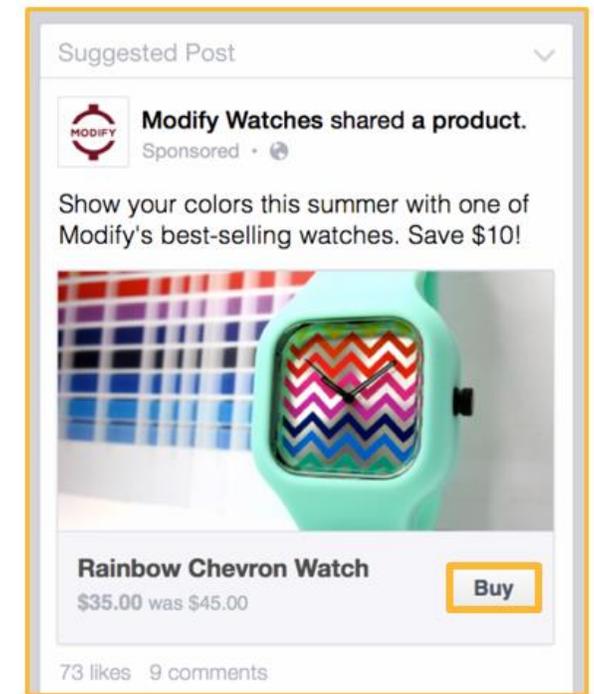


Nest Learning Thermostat 2.0
\$250000000 • Fancy Merchant

Buy now

Reply to Federica Merigo, Fancy 117

Facebook



Suggested Post

 **Modify Watches** shared a product.
Sponsored · 

Show your colors this summer with one of Modify's best-selling watches. Save \$10!

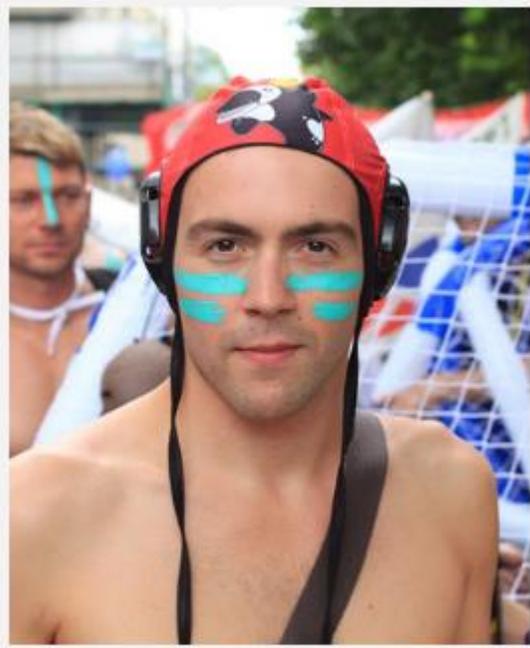


Rainbow Chevron Watch
\$35.00 was \$45.00

Buy

73 likes 9 comments

Global Swimming App



Artificial Intelligence

amazon → amazon alexa



Google →



Hi, how can I help?

Microsoft →



SAMSUNG →



Home



Security Camera



Thermostat

Google

Google Nest



Assistant

Amazon Echo

SAMSUNG SmartThings



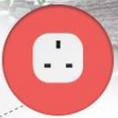
MOTION SENSOR



MULTI SENSOR



HUB



POWER OUTLET



PRESENCE SENSOR



Assistant

Samsung SmartThings



HomeKit



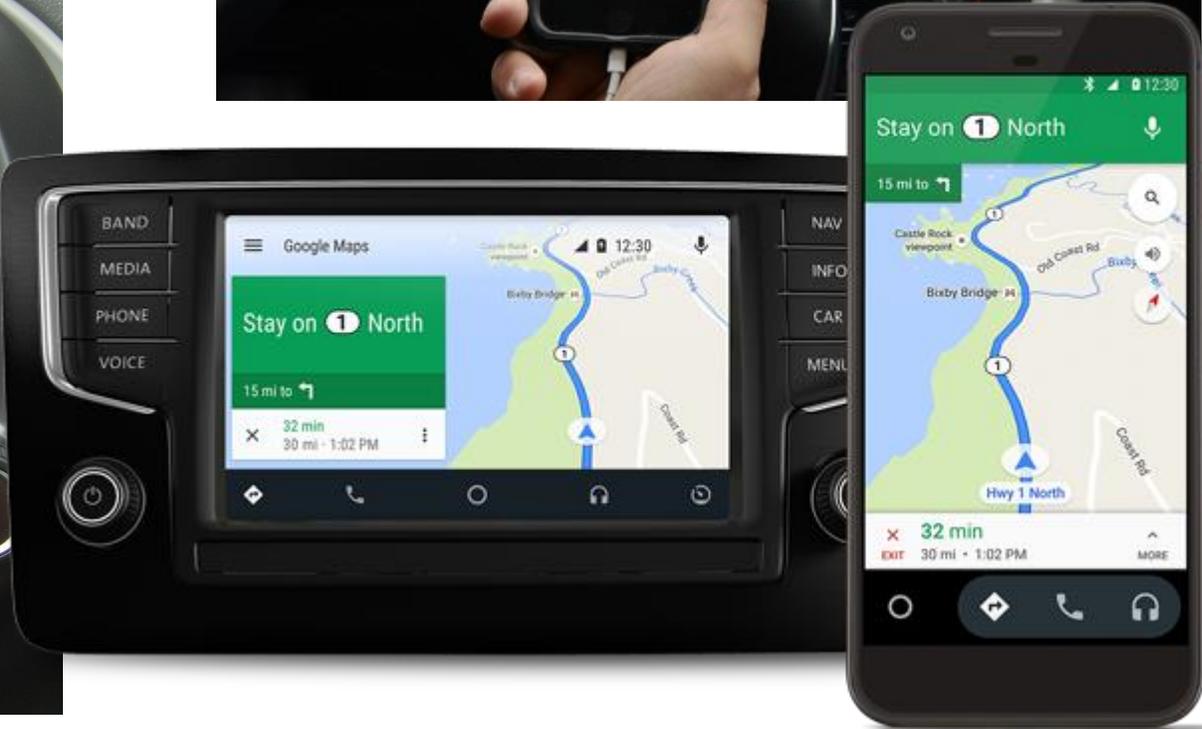
Assistant

Apple HomeKit

Facebook reportedly building smart speaker with touch screen

Car Integration

Apple CarPlay, Android Auto, Alexa

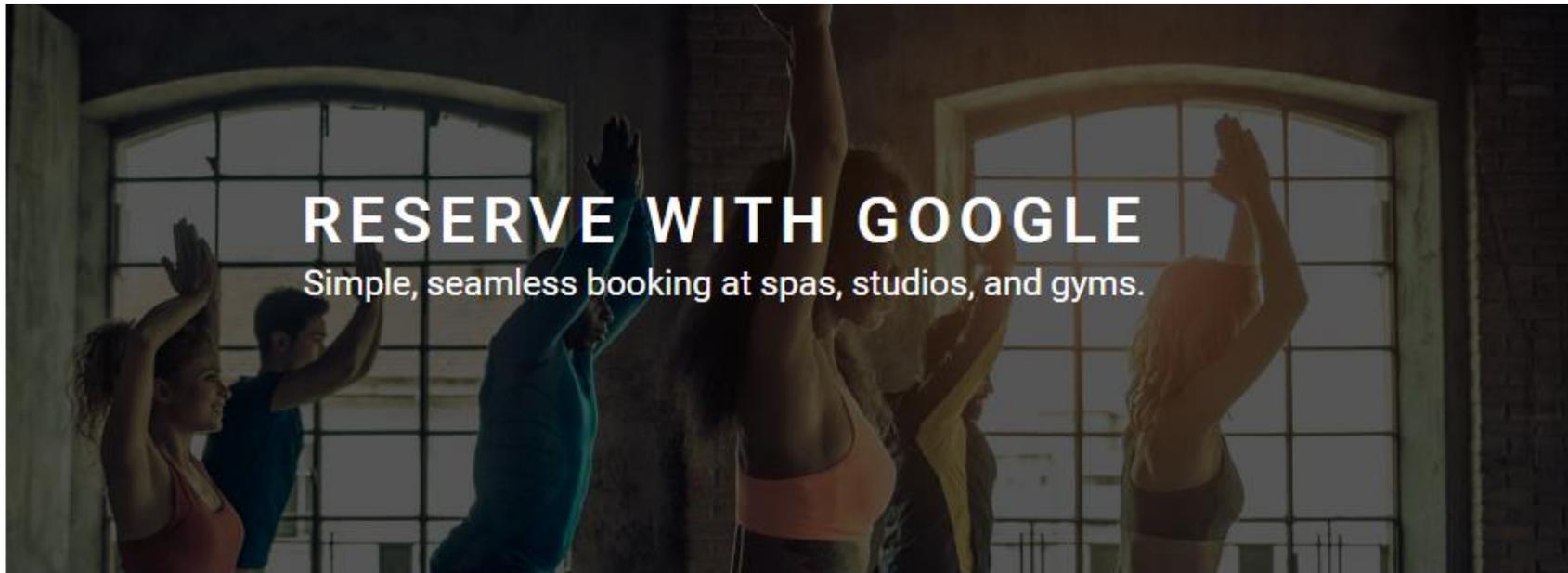


Purchased ARM



Fitness

- Personalisation
- Localisation
- Seamless Booking



Rebranding



More people
More active
More often

Sports Legacy



CIMSPA

CHARTERED INSTITUTE FOR THE MANAGEMENT
OF SPORT AND PHYSICAL ACTIVITY



**SPORT+
RECREATION
ALLIANCE**

University of Brighton

BBC Sport Get Inspired v Sport England Be Inspired

Get Inspired

BBC SPORT

be
inspired

#BeLimitless



NHS



The NHS offers a number of incentives to promote **physical activity** including:

- Apps - Be Food Smart, Active 10 & Couch to 5k
- Walking for Health incentive
- Free exercise videos
- Walkit - an interactive walk planner



Active 10 walking tracker

The Active 10 app will help you get into the habit of walking briskly for 10 minutes every day.

HEALTHY LIVING



Couch to 5K

Couch to 5K is designed to get you off the couch and running 5km in just nine weeks.

HEALTHY LIVING



Be Food Smart

Be Food Smart lets you look up the sugar, saturated fat and salt in everyday foods and drinks.

HEALTHY LIVING

Hospitals to offer spas, swimming and dance classes



The NHS wants to promote healthy living as part of its vision to prevent disease

10,000 Steps



- The history of 10,000 steps a day dates back to Japan in the 1960s
- Dr Yoshiro Hatano & his team determined the average Japanese person took between 3,500-5,000 steps a day
- They concluded that if they increased this figure to 10,000 they would become healthier and thinner
- Walking 10,000 steps a day could burn up to 20% of a person's daily calories

TfL Healthy Streets for London



“Our ambition is for all Londoners to enjoy the benefits of being active through walking or cycling for at least 20 minutes a day”

Street level: provide safer, easier & cleaner environments for all to enjoy

Network level: design & manage streets/rail systems to encourage more active travel

Future: active travel needs to be designed into the fabric of new developments & regeneration projects within the capital

If all Londoners walked or cycled for 20 minutes a day, this would save



in NHS treatment costs over 25 years and would contribute to fewer of the following⁵:

hip fractures	85,000	▼
dementia	19,200	▼
depression	18,800	▼
cardiovascular disease	16,400	▼
stroke	6,700	▼
type 2 diabetes	4,800	▼
colorectal cancer	1,500	▼
breast cancer	1,300	▼

Walking times between stations on the same line

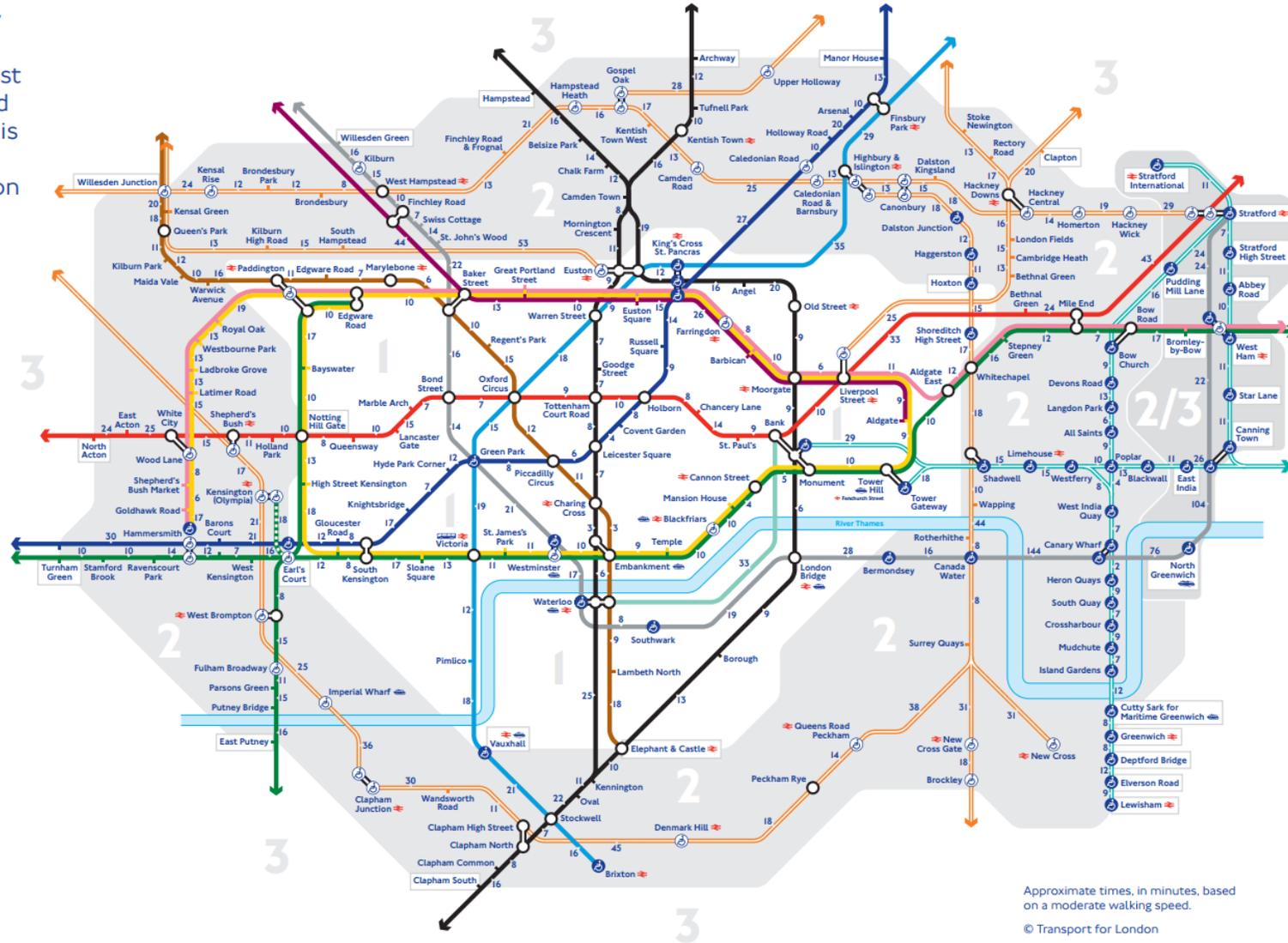
Walking can be a quick and easy way to get around, particularly when travelling during the busiest times, which are 08:00–09:00 and 17:30–18:30 Monday to Friday. This map shows how much time it takes to walk between stations on the same line. For more walking maps, visit tfl.gov.uk/walking.

Key to lines

- Bakerloo
- Central
- Circle
- District
- Hammersmith & City
- Jubilee
- Metropolitan
- Northern
- Piccadilly
- Victoria
- Waterloo & City
- DLR
- London Overground
- District open weekends and on some public holidays

Key to symbols

- Interchange stations
- S Step-free access from street to train
- P Step-free access from street to platform
- National Rail
- R Riverboat services
- C Victoria Coach Station



Approximate times, in minutes, based on a moderate walking speed.

© Transport for London

LeisureDB Social Index



[HOMEPAGE](#)

[SOCIAL RANKING](#)

[CONTENT EXPLORER](#)

[VOICE OF CUSTOMER](#)

[CHANNEL INSIGHTS](#)

[GEOGRAPHIC ACTIVITY](#)



SOCIAL LANDSCAPE



SOCIAL RANKING

A real-time overview of leisure brands online social activity.



CONTENT EXPLORER

All the content, keywords and themes being used on social in the leisure industry.



VOICE OF CUSTOMER

Social activity at a location level.



CHANNEL INSIGHTS

Review of the way the leisure industry uses Facebook, Instagram, Twitter and YouTube.



GEOGRAPHIC ACTIVITY

Social activity at a location level.

SOCIAL RANKING

 Date Range: 1 JUN 17 - 30 JUN 17
 Month Jun 2017

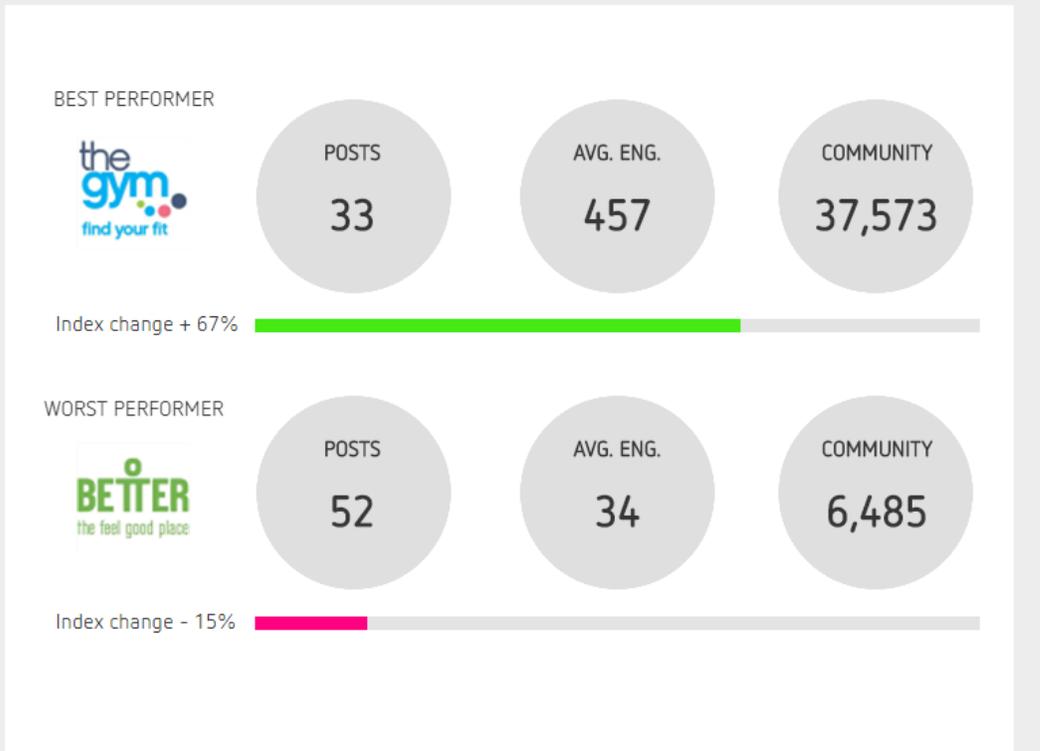

TOTAL ACTIVITIES



WHO ARE THE TOP SOCIAL PERFORMERS?

CLIMBERS AND FALLERS

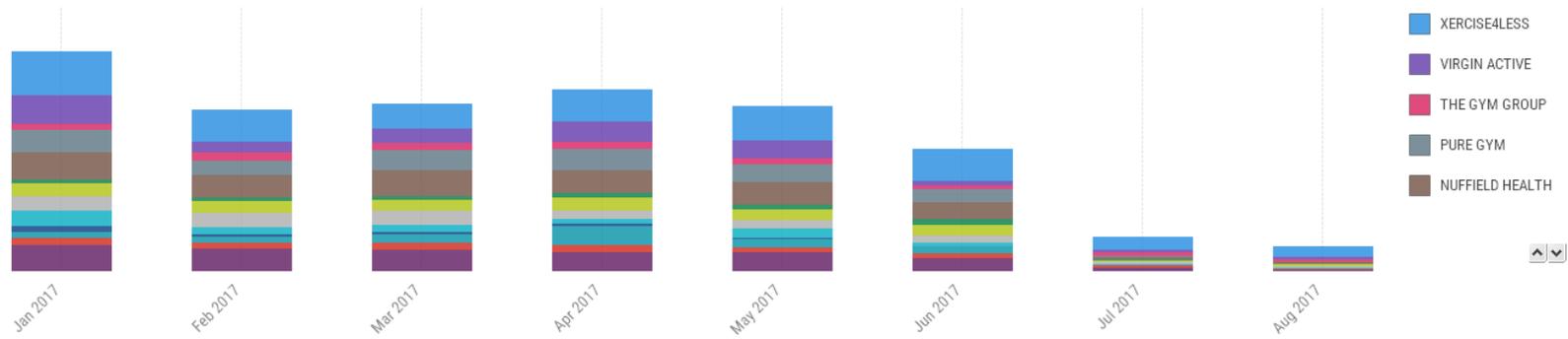
RANK	LOGO	BRAND	INDEX	TREND
1		THE GYM GROUP	1,215	67.0%
2		XERCISE4LESS	369	-1.9%
3		ANYTIME FITNESS	318	2.2%
4		VIRGIN ACTIVE	281	24.2%
5		EVERYONE ACTIVE	259	10.7%
6		NUFFIELD HEALTH	157	2.1%
7		BETTER	132	-15.5%



*Performance calculated on Avg. Post Engagement / Community Size

WHO IS DRIVING PERFORMANCE IN THE GYM SECTOR?

ACTIVITY COMMUNITY ENGAGEMENT RANK



WHICH CHANNELS ARE BRANDS FOCUSED ON?

TOTAL CATEGORY

BY BRAND

ACTIVITY COMMUNITY **ENGAGEMENT**

