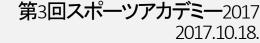
David Minton







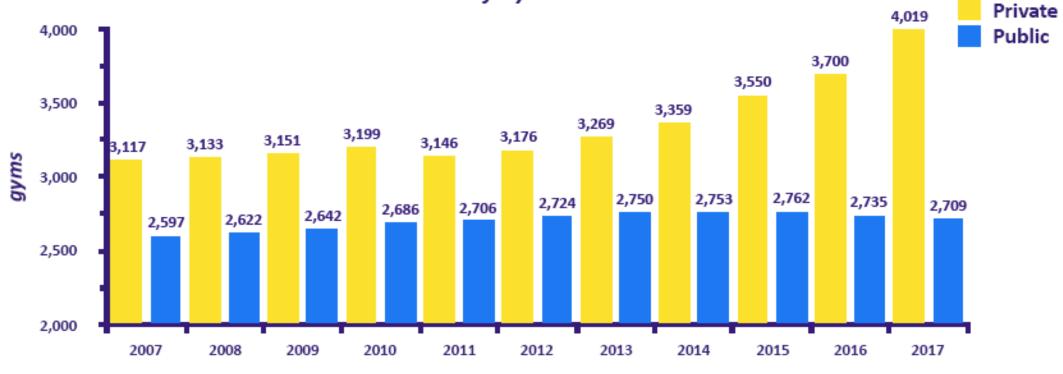


2017 State of the UK Fitness Industry



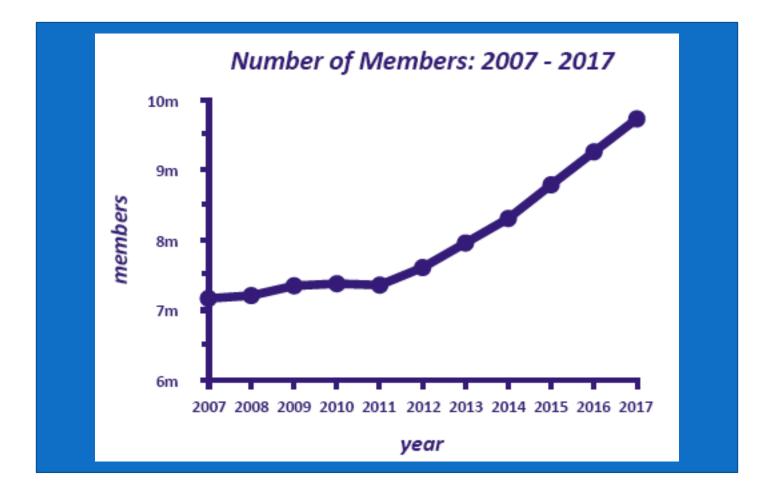
2017 Number of Gyms

Number of Gyms: 2007 - 2017



year

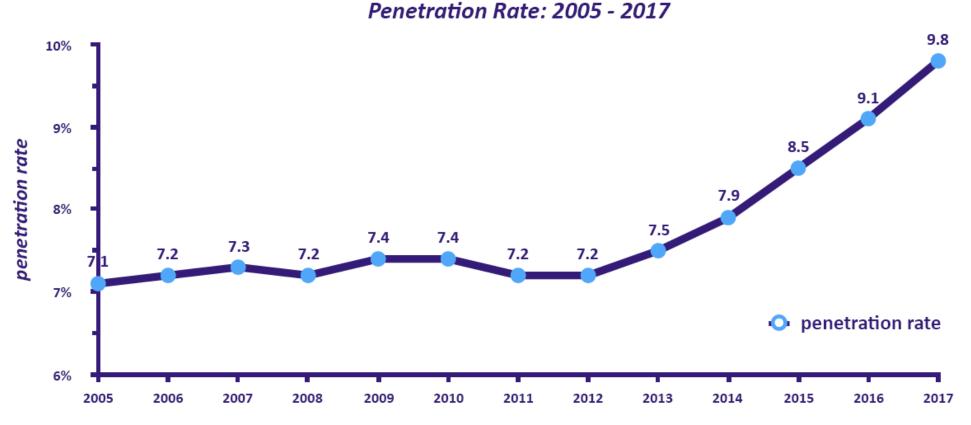
2017 Fitness Members



2017 Market Value



2017 Private Penetration Report



year

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	



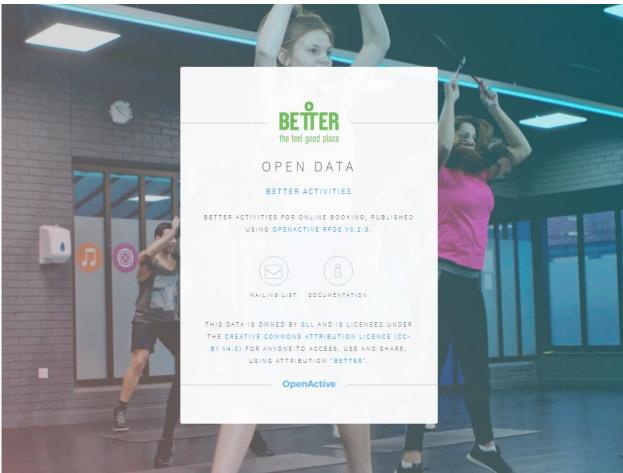
better for everyone

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

Sm

*(excluding libraries)

Open Data



Data Dump

••• • • • ΰO fusion-lifestyle-openactive.azurewebsites.net C. III TheFitExpo 10 Reggaeton Sky Go ATT Staging ButterBeer Cocktail GoodBarber Reseiler Best App Maker CCS Insight Nativest CC myAthletics Portal G-Drive Dialling codes Parallels Access This is Notlingham NFFC {"type':"Place","url'""http://ww.fusion-lifestyle.com/centros/southend-leisure-tennis-centre", "name":"Southend 17C", "identifier":"\$4527","address": ["type':"PostalAddress","postalCode":"SS 47X," streetAddress": "Garce Park", "telephone":"10(1):01),".nublvent":"["type':"PostalAddress","postalCode":"SS 47X," streetAddress": ["type':"PostalAddress","postalCode":"SS 47X," streetAddress": "Garce Park", "telephone":"10(1):01),".nublvent":[["type':"PostalAddress"," postalCode:"SS 47X," streetAddress": ["type':"PostalAddress","postalCode:"SS 47X," streetAddress": "Garce Park", "telephone":"["type':"DostalAddress"," feature:"101-10-13711:00:1007," endbate": "2017-10-13711:00:1007," "Addresses", "price": 4.007, "priceCurrency": "GBP", "betasageRage": 10", "genderRestriction: "mixed"), 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Sessions

C	🔒 Secure https://www.better.org.uk/odi/sessions.json
	url: "https://better.legendonlineservices.co.uk/enterprise/account/Login", + - View soi
	type: "Offer"
	},
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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 <u>Open Data Institute</u>.

🈏 Follow @openactiveio

CONTACT

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

Want to be kept informed of all that's happening? <u>Subscribe to our</u> monthly update.



Supported by the Open Data Institute and Sport England



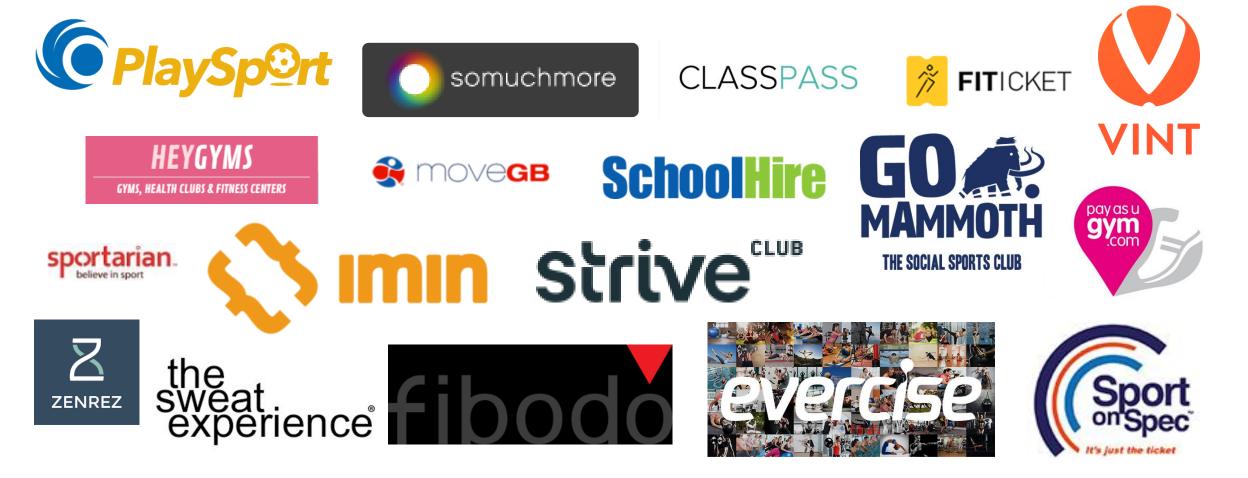
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Aggregators of the Fitness Industry



Boutiques It E B E BARRECORE RESHAPE YOUR WORLD **B**^{\$}RRY'S BOOTCAMP **CrossFit** PSYCLE SPEEDFLEX#

MIN KICKBOX FITNESS

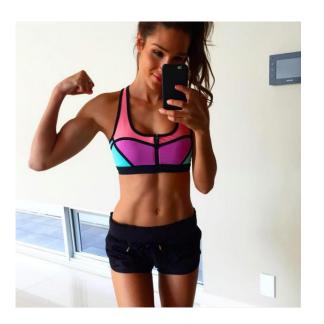
Fitness without boundaries

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









Runtastic



Sweat





Nike+ Run Club



SwimIO



R

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 communuty.



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



Facebook

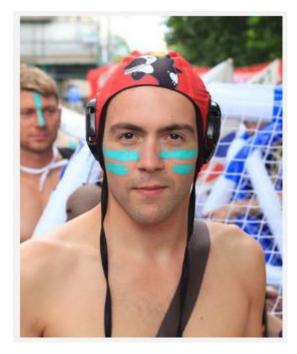
Suggested Post



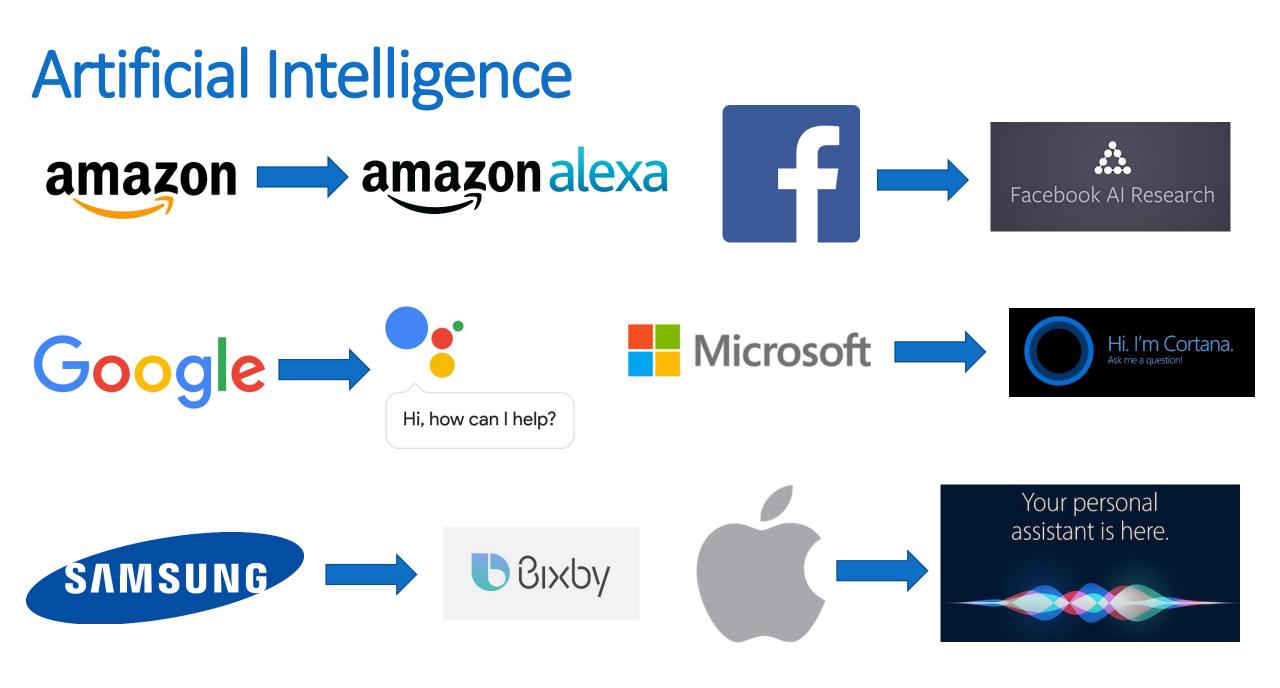
Show your colors this summer with one of Modify's best-selling watches. Save \$10!

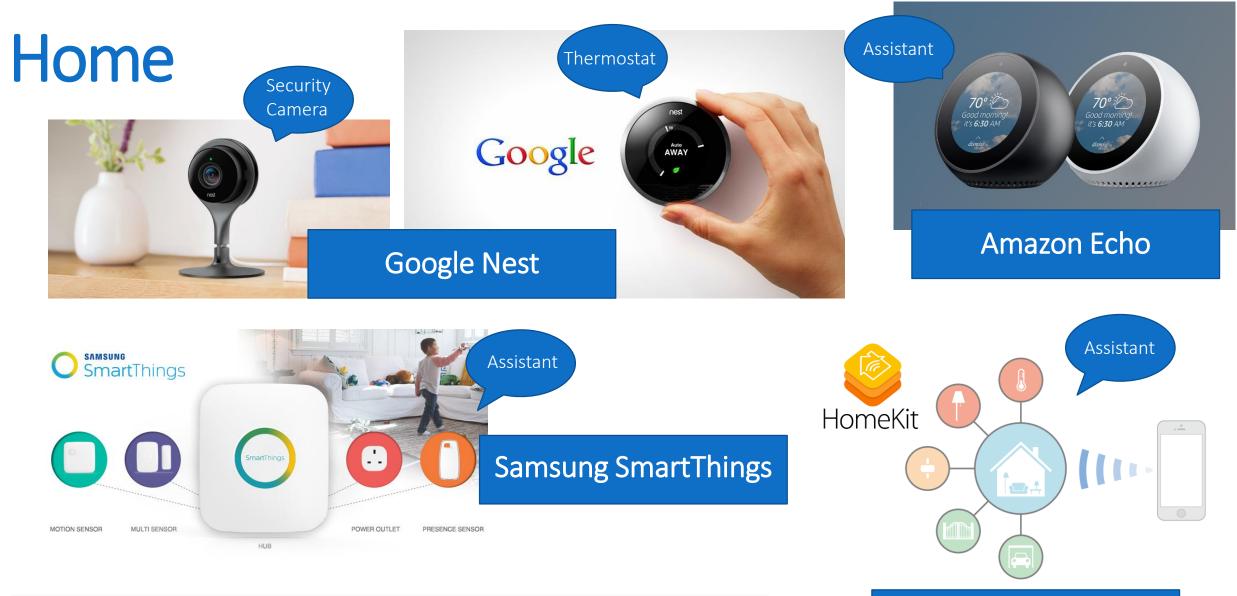


Global Swimming App









Facebook reportedly building smart speaker with touch screen

Apple HomeKit

Car Integration

Apple CarPlay, Android Auto, Alexa



11:25 37

Ford

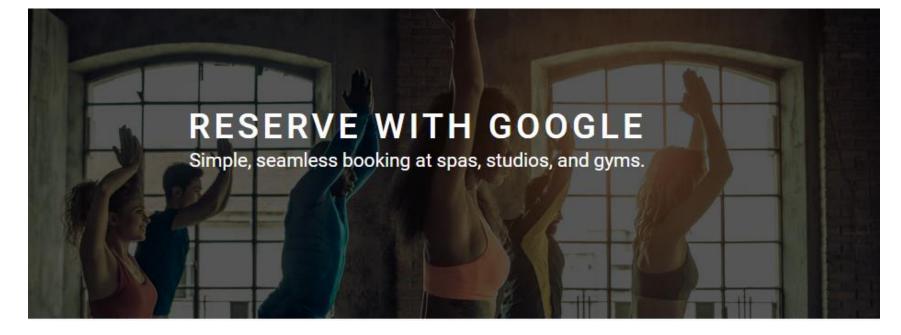
Purchased ARM



Fitness

- Personalisation
- Localisation
- Seamless Booking







Rebranding





More people More active More often



University of Brighton

REATION

BBC Sport Get Inspired v Sport England Be Inspired





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



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

HEALTHY LIVING



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.

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 be come 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**.



Finchley Road & Frognal

Chalk Fa

llesden Green

12 Park



0

+ Stratford

MAYOR OF 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.

					: 1 Jun 17 - 30 Jun 17 Jun 2017			• < >	
						TOTAL ACTIVITIES	S		
		POST	^{-s} 762			COMMUNITY	7	AVG EN 34	IGAGEMENT
WHO /	ARE TH	E TOP SOCIAL	PERFOR	MERS?			CLIMBERS	S AND FALLERS	
RANK	LOGO	BRAND	INDEX	TREND					
1	find your fit	THE GYM GROUP	1,215	67.0%		BEST PERFORMER			
2	XENCES 4LESS	XERCISE4LESS	369	-1.9%	н	find your fit	POSTS	AVG. ENG. 457	сомминту 37,573
3	\$^2	ANYTIME FITNESS	318	2.2%					
4	V active	VIRGIN ACTIVE	281	24.2%	H	Index change + 67%			
5	even one Active Feel better for it	EVERYONE ACTIVE	259	10.7%	1	BETTER	POSTS	AVG. ENG.	
	0	NUFFIELD HEALTH	157	2.1%		the feel good place	52	34	6,485
6	Nuffield Health					Index change - 15% 🔳			

WHO IS DRIVING PERFORMANCE IN THE GYM SECTOR?

ACTIVITY COMMUNITY ENGAGEMENT RANK

