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HANDBOOK 2020

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Welcome to the HCM Handbook 2020

At this unprecedented time, when almost two thirds of the world's health and fitness clubs have closed and around 230 million members are unable to attend their regular place of exercise, how is the health and fitness industry weathering the storm?

Although undeniably challenged by COVID-19, the first quarter showed promising growth. Fitness clubs and instructors swiftly embraced digital fitness, reaching out to members with apps and online classes, driven by a strong message to stay active.

Launched by The Leisure Database Company, a new global fitness data platform called fitNdata is monitoring the effects of lockdown by combining real-time supply data with consumer fitness data. Researchers are busy exploring the applicability of fitness wearables to measure potential precursors of symptoms (noticeable increase in respiratory rate or body temperature) to inform wearers of their health status, even if asymptomatic, to help stem the spread. The UK Government has stepped in to alleviate financial hardship with its Coronavirus Self-employment Income Support Scheme, throwing a lifeline to around 60,000 people in the sport and physical activity sector. Although it may



fall short for those with less than 12 months' trading and directors of small limited companies, CIMSPA, ukactive and Community Leisure UK have teamed up to call for clarity. As the year unfolds, we'll bear witness to more new measures, so let's now step back to summarise the state of the sector in 2019.

The European fitness industry was marked by a period of growth, with total revenues at clubs across the continent rising by 3.1 per cent on 2018, driven by a 2.3 per cent rise in the number of facilities and a 3.8 per cent boost in memberships. Germany strengthened its position as the country with the highest number of gym members, while Norway and Sweden ranked highest for market penetration. M&A activity continued, with 17 major transactions in the operator market, and continued consolidation resulted in the top 30 European fitness club operators representing more than a quarter of all memberships. Confidence in reaching the industry goal of 80 million members in Europe by 2025 remains strong. On the back of this solid foundation, let's embrace 2020 as the year we pulled together to stay active, stay safe.

Helen Patenall, editor, HCM Handbook



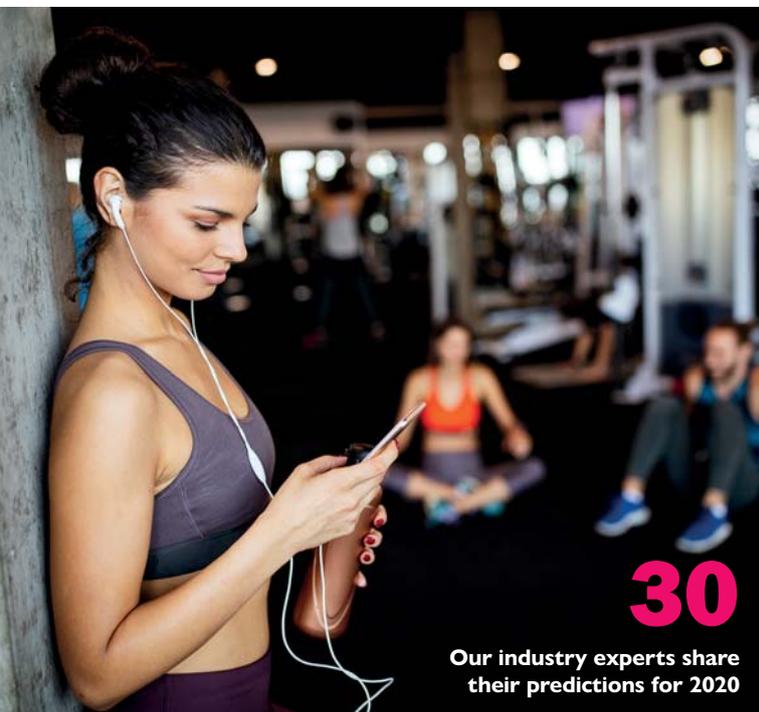
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HCM Fitness Trends
2020 in detail

PHOTO: SHUTTERSTOCK/JACOB LUND



Our industry experts share
their predictions for 2020

PHOTO: SHUTTERSTOCK/ND300

05 Editor's letter

The coronavirus pandemic is presenting the global fitness industry with unprecedented challenges, but also highlighting the fundamental importance of health and wellbeing, says Helen Patenall, HCM Handbook editor

14 Fitness Trends 2020

HCM magazine editor, Liz Terry, outlines the key trends, influences and opportunities set to shape health and fitness, from outdoor fitness to pandemic insurance

INDUSTRY INSIGHTS

30 2020 predictions

What were we expecting for the industry in 2020 before the pandemic struck? According to our panel of experts, membership packages for Gen Z are ripe for a rethink, and savvy employers should be thinking about putting in place bespoke digital tools for staff wellbeing

36 Call to action

When it comes to boosting fitness membership, it's judicious to meet the needs of the lucrative over-55 market. DataHub's Utku Topraksevtin shares insights from the latest *Moving Communities: Active Leisure Trends* report and how best to get with the programme

44 Top talent

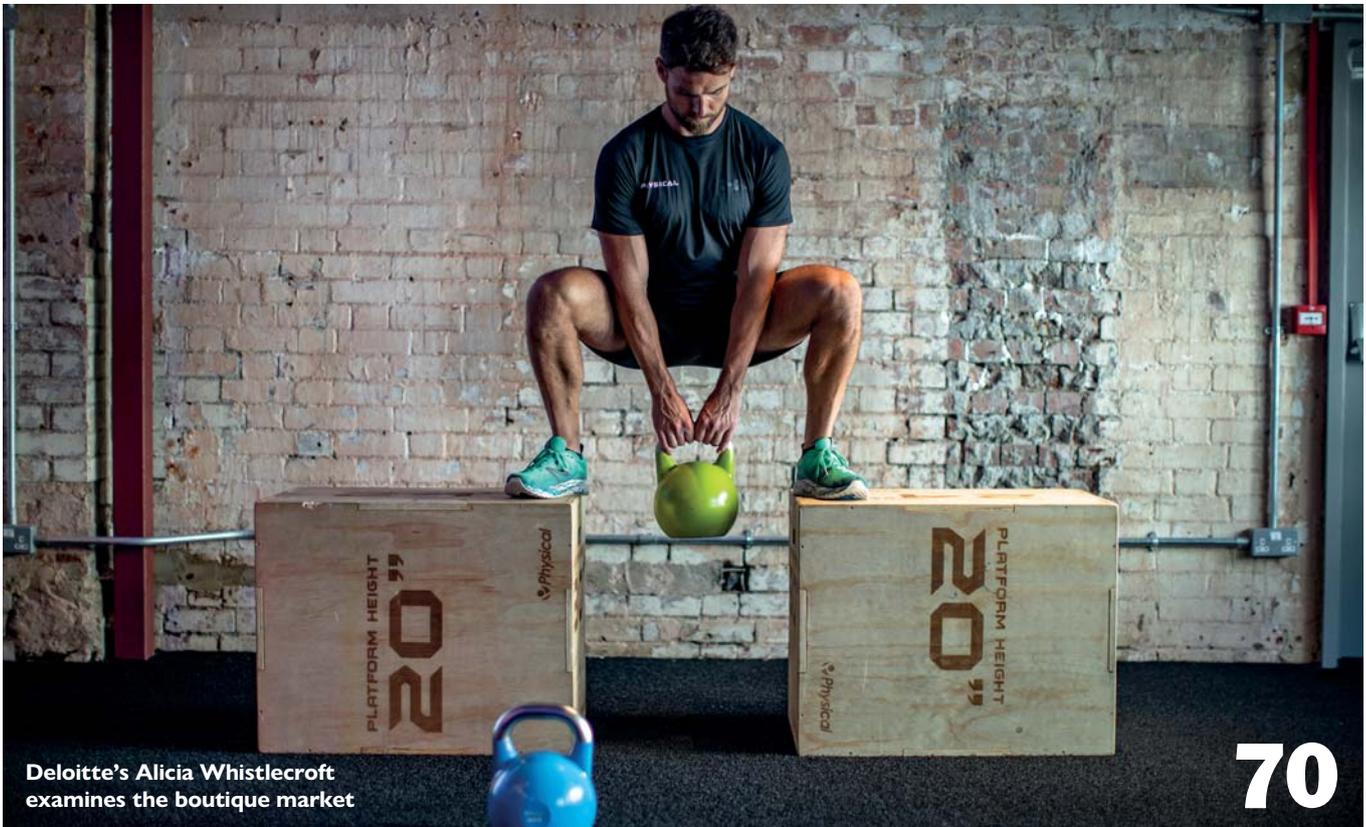
Finlay Macdonald from Les Mills explores how to make the most of your finest group exercise instructors. Armed with enough influence to positively boost membership numbers, it's vital to reward, train and value your best in class

50 True cost

Vitality and RAND Europe have carried out a global study revealing that increased physical activity can benefit not only individuals but also businesses and global economies. Andre Nepgen shares the insights

54 London calling

David Minton and his team at The Leisure Database Company take a tour of the capital's diverse and boutique sector to share their cream of the crop



Deloitte's Alicia Whittlecroft examines the boutique market

70

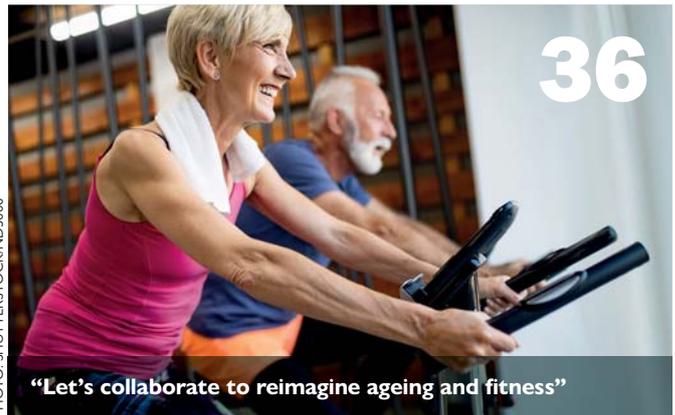
RESEARCH ROUND-UP

62 On the button

According to the latest *European Health & Fitness Market Report*, the industry was showing signs of strong growth before the pandemic, bolstered by cutting-edge technology and new concepts. Realising a membership goal of 80 million in Europe by 2025 is now a challenge to tackle

70 Smart money

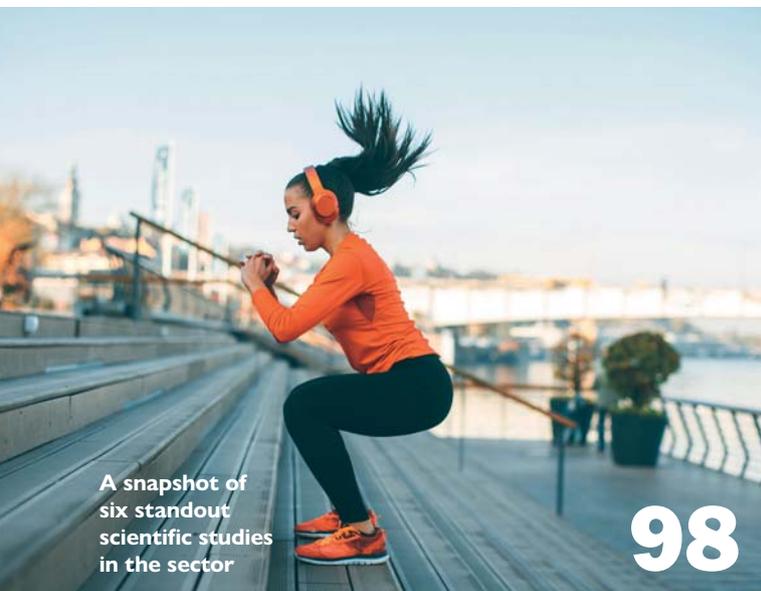
Deloitte's Alicia Whittlecroft summarises findings from the *State of the UK Fitness Industry Report*. Budgets and boutiques are challenging the domestic status quo, throwing up a range of new opportunities



36

PHOTO: SHUTTERSTOCK/ND3000

“Let’s collaborate to reimagine ageing and fitness”



A snapshot of six standout scientific studies in the sector

98

PHOTO: SHUTTERSTOCK/GORAN BOGICEVIC

78 Universally fit

Melissa Rodriguez presents key stats and analysis from *2019 IHRSA Global Report* into the worldwide health and fitness sector. The report will stand as a benchmark for the recovery of the industry post COVID-19

84 Body and soul

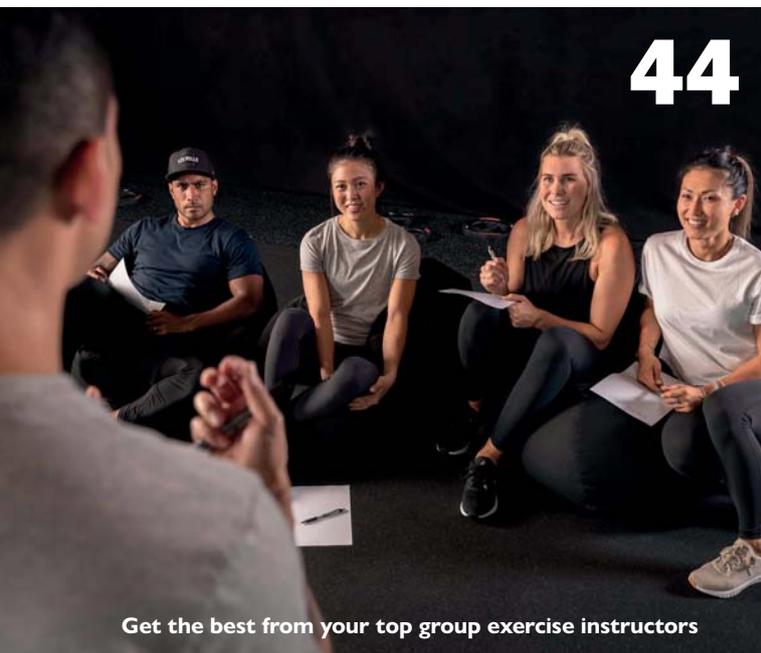
The Global Wellness Institute's *Move to be Well: The Global Economy of Physical Activity* report uncovers the activity segments that can deliver and monetise more participation. Leonor Stanton takes a look at the data for HCM.

92 Fit together

Marcus Kingwell from EMD UK reports on *Sweating Your Assets: The Value of Group Exercise*. Together, UK local authorities, operators, the workforce and the industry can promote group exercise to bring about a healthier nation

98 Science snapshots

Our news team at HCM rounds up some of the highlights from recent medical research in the health, fitness and wellbeing industry. Give your brain a boost, work out safely and tweet your fitness are just some of the insights



44

Get the best from your top group exercise instructors

WHO'S WHO

106 UK operators

We profile the leading operators in the UK health and fitness market

136 European operators

We share details of the key health and fitness operators from across Europe

150 The age of independents

Independent operators are driving creativity in the delivery of a wide range of vibrant fitness businesses. We look at some of the best, from those catering for members with elite sporting backgrounds to inventive gym spaces

62



By pulling together, the European sector will reach its goal

PHOTO: CHRIS GONZ

FRANCHISE SECTOR

158 Franchise briefing

The franchise sector has investors keen to back businesses with the potential to grow

166 Franchise profile

We talk to a fitness operator in the franchise sector

PRODUCTS & SERVICES

170 Company profiles

Key fitness suppliers and training providers

50



PHOTO: SHUTTERSTOCK/FLAMINGO IMAGES

Empowering staff to be fit and healthy is paramount

INDEX

236 Industry organisations

Contacts for health and fitness trade associations

240 Product innovation

Lauren Heath-Jones brings you the latest inspiring health and fitness innovations and new launches

250 Supplier contacts

Contacts for key industry suppliers and service providers



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Kresten Juel Jensen & Nick C
are gamifying home fitn

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FIT TECH



INSIDE ISSUE ONE

Motosumo's Nick Coutts and Kresten Juel Jensen are gamifying group exercise

Jean-Michel Fournier envisions the future of group fitness

Amazon's Toni Knowlson

Markos Kern: Tech can get people addicted to fitness

Tech Talk: What's the future of home fitness?

Krissy Cela: using social to promote wellbeing

John Foley, Peloton: The founder and CEO talks about his journey

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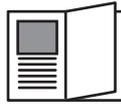
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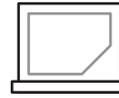
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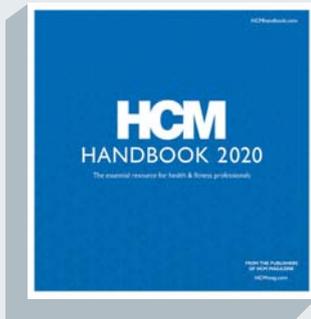
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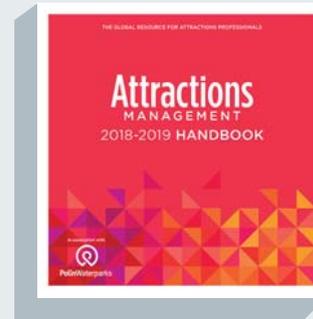
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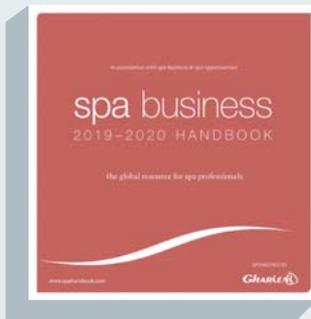
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HCM Fitness Trends 2020

COVID-19 has changed the world as we know it. This year's HCM Fitness Trends have been updated to reflect the new reality of the challenges being faced by operators globally

- 1 HOME WORKOUTS
- 2 OUTDOOR FITNESS
- 3 PPE
- 4 DIVERSIFICATION
- 5 HYGIENE
- 6 FIT TECH
- 7 DISTANCING CONTROL
- 8 BUTT WORKOUTS
- 9 STRENGTH TRAINING
- 10 PE
- 11 PANDEMIC INSURANCE
- 12 MENTAL HEALTH SUPPORT
- 13 ELIMINATING MALE BIAS
- 14 SWIMMING
- 15 POST-EXERCISE HEAT
- 16 CATERING FOR INTROVERTS
- 17 TRIM TRAILS
- 18 EcSOD
- 19 OUTDOOR GYMS
- 20 SENOLYTICS

Numbers do not indicate a ranking



PHOTO: LES MILLS

Les Mills on Demand partners with gyms to offer home workouts to members

STREAMING & ON DEMAND

1. HOME WORKOUTS

The coronavirus pandemic has seen health and fitness operators the world over pivoting to digital to create live streaming or on-demand workouts to keep members engaged and – where it's possible and appropriate to charge – revenues flowing.

Emergency club closures have unleashed huge energy across the sector, with operators creating digital offerings in a matter of hours in some cases. Gyms who've chosen to charge are reporting sign-up rates

upwards of 50 per cent, with some studios reporting 100 per cent retention where customers have close ties to the team.

Professional services such as Les Mills on Demand and Wexer have been adopted by many. Others have created home-grown offerings. Operators, such as David Lloyd have created portals with @home services such as nutritional and wellbeing advice.

We expect these services to become part of diversified health club offerings.

ENJOYING THE FREEDOM

2. OUTDOOR FITNESS

With the world in lockdown for much of 2020, we're looking forward to how things pan out when we make tentative steps outside.

We believe one of the greatest areas of demand from consumers when it comes to their health club offering over the next few years will be all forms of outdoor fitness.

The coronavirus is less transmissible in the open air, making things safer, while the psychological benefits of outdoor fitness are well documented in terms of improving mental health.

In addition, many people will have been indoors for months and will place a high value on being outdoors in nature and getting some freedom.

Expect brands such as The Green Gym and Bear Grylls' BMF (Be Military Fit) to see rapid growth over the next year, as exercise beyond the four walls becomes hugely popular.

Health clubs with outdoor areas need to freshen them up and do some outdoor programming and clubs without greenspace need to find the nearest park and programme in some outdoor fitness sessions.

Running and cycling groups will also be popular, being mindful of recent slipstream research which shows that the safe distance for runners in terms of coronavirus transmission is five metres, slow cyclists, 10m and fast cyclists, 20m. As with all things in 2020/21, safety will be the number one priority. ▶



Clubs need to offer outdoor workouts or lose customers to competitors who offer this option

CARING FOR STAFF

3. PPE

We expect gym staff to require personal protective equipment (PPE) until a vaccine is found for COVID-19, as they'll be in the front line.

Operators will need to prepare for the additional cost and organisation required to provide all relevant types of PPE to safeguard staff as they deal with members of the public.

This could include screens at reception, masks and disposable gloves.

Staff may also need gowns when carrying out cleaning duties.

We may also see members wearing masks and clubs can consider making these available as part of the service, free or paid for, depending on budget.

LEARNINGS FROM COVID

4. DIVERSIFICATION

Operators that make it through the shutdown will vow to never again leave themselves so exposed to limited, revenue streams and will move to diversify at the first opportunity.

We expect to see moves into other sectors, as well as increased activity in areas such as mail-order retail, F&B – including home delivery – streaming subscriptions, health checks, sleep health insurance sales, etc. Some delivered under license or through partnerships.

PHOTO: SHUTTERSTOCK/OLEKSANDR KHMELEVSKIY



COVID-19 can survive on plastic and metal, so deliverable hygiene will be critical

FIRST PRIORITY

5. HYGIENE

Previously an afterthought for many gyms and certainly something the industry has been less than enthusiastic about at best, hygiene will become the number one obsession for operators and gym users – especially until a vaccine has been developed and implemented for COVID-19.

We expect gyms to commit to the highest levels of sanitation to reassure customers it's safe to return and with finances under pressure, keeping the gym spotless is likely to

become the responsibility of gym staff, who will need to ensure that all contact points, from doors to dumbbells and fitness kit, are carefully cleaned between users. Operators are unlikely to be able to afford to deploy specialist services on a regular basis, although we will see deep cleaning before reopening.

Most gyms will choose to keep changing rooms, spas and pools shuttered to avoid creating hazards and customers will be accepting of these limits to service.



PHOTO: SHUTTERSTOCK/SYDA PRODUCTIONS

We expect tech to drive multiple aspects of the fitness industry, including a major move towards prevention

DYNAMIC INNOVATION

6. FIT TECH

The coronavirus pandemic has put fitness and health in the spotlight, as evidence continues to emerge about morbidity factors in relation to COVID-19.

Although there are exceptions, the majority of people who succumb to the disease or experience it more severely have underlying health problems – the vast majority of them lifestyle-related.

We expect fitness to assume far greater importance from a public policy point of

view going forward, with governments – after decades of paying lip service to prevention – finally inspired to get behind an effective preventative agenda.

Because of the scale of the challenge, we expect them to look to the fitness industry to be an effective partner in achieving this goal. We also think fitness technology will be deployed to drive interventions, engagement and reporting on initiatives relating to this work and that this will happen at scale.

With all major tech organisations already heavily invested in the fit tech space and a wealth of start-ups bringing new products to market, we also expect the consumer market for fit tech to grow rapidly as people – driven partly by fear – look for support in relation to taking more responsibility for their own health and wellbeing.

The scale of the challenge is such, that we will need to harness technology to deliver. ►

NEW SOFTWARE

7. DISTANCING CONTROL

Software is now available – developed for retailing – that uses an algorithm and in-gym cameras to control social distancing. We expect this to be picked up and deployed by gym operators as part of reopening plans.

Implementation of these systems will reduce risk and liability and show members their gym is really serious about looking after their wellbeing.

It will also be far more cost-effective and reliable to use social distancing software than to tie up gym staff.

FROM THE US TO THE WORLD

8. BUTT WORKOUTS

Big in the USA, where a substantial derriere is a powerful fashion accessory, (à la Kim Kardashian and others), 'butt workouts' will start to gain in popularity in other markets around the world.

Expect specialist equipment, dedicated, workouts and maybe even butt apps and associated spa and beauty treatments to enable the creation and maintenance of a protruding posterior.

On a more serious note, it's thought a large proportion of back trouble originates in the glutes, so there will be an opportunity to also develop more curative interventions to address this.



PHOTO: SHUTTERSTOCK/TAKOBRITO

After years of a focus on cardio, strength training is a new priority

NEW PRIORITY

9. STRENGTH TRAINING

New guidance issued late in 2019 by chief medical officers in both the UK and the US places an increased emphasis on the importance of building strength and balance for adults.

Under the new guidelines, adults are advised to undertake strength-based exercise at least two days a week to help delay the natural decline in muscle mass and bone density that starts from around the age of 50. This is a major reason why

older people lose their ability to carry out daily tasks and succumb to falls.

The new guidelines follow decades where cardiovascular exercise received more attention and was more often requested by members and recommended by trainers.

We expect new exercise modalities to spin out of this focus on strength, with strength training becoming popular as an addition to HIIT training, as well as being a more popular option in its own right.



JOE WICKS EFFECT

10. PE

Celebrity trainer and motivator, Joe Wicks, hit the headlines in the UK during the lockdown by stepping up with his daughter Indie to offer a daily workout at 9.00am every Monday to Friday for kids on his The BodyCoach TV YouTube channel.

Called PE with Joe, the sessions were designed to replace the usual school PE lessons and Wicks pulled out all the stops,

sometimes wearing crazy costumes and creating sessions bursting with energy to engage children (and parents) in some serious exercise, combined with silly fun.

PE has been a less-than-fashionable area of activity in recent years, but we expect Wicks' inspired take on the PE lesson to lead to a revived interest in school PE as an exercise category.

Wicks had already spent four years touring schools promoting exercise and is now said to be in talks for his own TV show based on the PE lessons.

Joe Wicks attracted over a million people a day to take part in his PE lessons

With kids' exercise a priority and childhood obesity a global crisis, a new focus in this area is long overdue. Kids today are tech-savvy and will have been influenced by online workouts during lockdown. We think virtual PE lessons in schools and at home will be a natural extension of this trend. ►

▶ PANDEMIC INSURANCE

11. MORE INSURED

Health and fitness operators who had the foresight to take out (useable) pandemic insurance have been few and far between – not many have been fortunate to have the backing of their insurance company during the COVID-19 shutdown. Those that did have found their future secured.

We expect to see a new interest in business interruption insurances of all kinds, as operators seek to protect their position in relation to any future business disruption of any kind.

INCREASINGLY VITAL

12. MENTAL HEALTH

The pandemic has accelerated the incidence of mental health issues and health club operators have the opportunity to do something to help.

We expect more health and fitness operators to launch mental-health-related services and specialist mental health memberships – in-club and virtual – to support members who need ongoing access to support.

Mental health services will be delivered in partnership with specialist organisations who are experienced in this area, to ensure people who need support are looked after by experts.



PHOTO: SHUTTERSTOCK/LUCKY BUSINESS

Work is needed to eliminate male bias in research and practice

EFFICACY FOR ALL

13. ELIMINATING MALE BIAS

Historically, most of the cells (and humans) studied in medical science have been male and so most of the advances we've seen in medicine and exercise science have come from the study of male physiology.

This means we understand less about pretty much every aspect of female biology when compared to that of males.

Drug trials have also historically been biased towards men, meaning even today some drug dosages are calibrated for male physiology and typical body size.

Some of the studies that have defined the world of exercise – for example, the 1982 Multiple Risk Factor Intervention

Trial (MRFIT) – which looked at whether dietary change and exercise could help prevent heart disease – only examined male subjects. This specific piece of research studied 13,000 men and no women.

We expect there to be an increasing awareness of the importance of eliminating male bias when it comes to research into exercise and health and the prescription of physical activity interventions.

A significant number of women are taking part in regular exercise and it's vital their needs are understood. We hope the field of exercise science will commit to eliminating male bias in all studies going forward.

CAN'T DO THIS AT HOME

14. SWIMMING

The lockdown has made the whole fitness industry focus on its USPs – what are we really charging for? What can people ‘only’ do in our gyms and nowhere else?

Streaming, virtual and digital fitness have come into their own during the pandemic, but they’ve shown some people that they don’t need to go to the gym all the time.

As the most popular leisure time activity, pool swimming is one activity offered by many gyms that’s hardest to access anywhere else, unless you’re lucky enough to have a pool at home. A significant number of gym goers have been taking to social media saying how much they miss their swims.

With its pleasurable weightlessness, swimming is almost the complete exercise – offering strength and cardiovascular training, as well as flexibility, so can be a valuable part of a balanced exercise regime. The only extra needed is weight-bearing exercise.

Being in water is also very healing and good for the body, as well as offering a number of mental health benefits.

When gyms fully reopen, we expect there to be a new enthusiasm for swimming and for health club operators to refocus their energies on areas of provision which can’t be enjoyed elsewhere, such as access to specialist equipment and advice and activities which use the pool and wet areas of clubs. ►

Clubs with pools will find their popularity grows in the years following the end of the pandemic



PHOTO: SHUTTERSTOCK/MICROGEN



PHOTO: UNSPLASH/RYAN-CHRISTODOULOU

Spending 30 minutes submerged in hot water after a workout amplifies the effect of the exercise

AMPLIFYING EXERCISE

15. POST-EXERCISE HEAT TREATMENTS

Staying warm after a workout can amplify the effects, according to new research – *How post-exercise heating strategies affect endurance performance* – sponsored by ACE, the American Council on Exercise.

Researchers tested three groups – a control group, one which spent 30 minutes in hot water and another where people wore sauna suits following their workout.

Both passive heating strategies were equally sufficient to raise core temperatures, and both stayed below temperatures (102° F/ 39° C) that might increase the risk of heat illness.

After three weeks, the mean VO₂max and lactate threshold changes in both

the hot water immersion and the sauna suit groups were “statistically significantly greater” when compared to the control group, according to the researchers.

When it came to change in running economy, only the people in the immersion group showed a significant improvement.

Researchers said these post-exercise heat interventions allow people to “augment their training without adding volume and/or intensity, meaning they can achieve performance gains without increasing the risk of over-training or injury.”

Post-exercise passive heating can also be used to “preserve training adaptations if a client is travelling or trying to preserve

fitness during an off-season programme,” they said. They also suggest not going beyond the 30 minutes or above the temperatures used and encouraged the adoption of good hydration practices.

With many operators increasingly training athletes and serious amateurs who care about performance, these relatively straightforward-to-apply interventions offer new opportunities to improve services.

We expect gyms to better exploit facilities that enable the delivery of post-workout heat treatments and to ensure their exercise professionals are trained to deliver them safely and effectively.

More: HCMHandbook.com/ACE



Introverts will come to your gym if you adjust your operations to their needs



READ ONLINE

WELCOME ALL

16. CATERING FOR INTROVERTS

In a world set up to reward extrovert behaviour, introverts are commonly misunderstood and judged – labelled as shy, lacking in confidence or even boring.

The difference between introverts and extroverts is how they respond to the neurotransmitter dopamine: a chemical released in the brain that provides the motivation to seek external rewards.

Put simply, extroverts recharge with people and introverts recharge on their own – gyms tend to be extrovert environments.

Many perform poorly when it comes to catering for introverts, but there's much that can be done to change operating procedures to make gyms more welcome – ensuring some equipment is placed in a quiet corner where more introverted members feel comfortable exercising, opening studios early to enable them to come in and find their spot and taking time to make them feel welcome.

We think operators will begin to recognise introverts find the gym challenging and that introvert-friendly operations will develop.



PHOTO: SHUTTERSTOCK/DEJAN DUNDJERSKI

Trim trails will be reinvented for the 'obstacle-race' generation

RETRO REVIVAL

17. TRIM TRAILS

Big in the 80s, we think trim trails will make a comeback as a result of the pandemic, given they offer a straightforward and relatively cheap way to facilitate outdoor exercise.

The obstacle race sector has boomed since trim trails were last in vogue and we expect a new generation of trails to be developed – in part to play to the needs of frustrated obstacle course competitors who will not be able to take part in outdoor racing for some time, due to social distancing rules and ban on large gatherings. ▶



PHOTO: SHUTTERSTOCK/JOCOB LUND

New research shows exercise can help people survive COVID-19 by promoting the secretion of the antioxidant, EcSOD

SURVIVING CORONAVIRUS

18. EcSOD – FITNESS TO OFFSET THE EFFECTS OF COVID-19

Approximately 80 per cent of confirmed COVID-19 patients have mild symptoms and do not need respiratory support. Professor Zhen Yan at the University of Virginia set out to find out why.

Yan found regular exercise may reduce the risk of complications in people with COVID-19, as well as offering the potential for alternative treatment approaches.

He studied an antioxidant called extracellular superoxide dismutase (EcSOD)

that’s released in the body during exercise.

His work “strongly supports” the possibility that higher levels of EcSOD in the body can prevent or at least reduce the severity of acute respiratory distress syndrome (ARDS) – one of the worst outcomes of COVID-19. EcSOD does this by hunting down free radicals, binding to organs and protecting tissue.

“Our findings strongly support that enhanced EcSOD expression from skeletal

muscle...which can be redistributed to lung tissue, could be a viable preventative and therapeutic measure in reducing the risk and severity of ARDS,” he said.

Research suggests that even a single session of exercise increases the production of the antioxidant, with cardiovascular exercise thought to drive the highest immediate levels of EcSOD production. However, strength training increases muscle mass, also playing a part in the equation.

A NEW GENRE

19. OUTDOOR GYMS

Post-COVID, outdoor exercise will be a major way forward, so we expect to see a new generation of outdoor, all-weather fitness equipment coming to market and operators investing in circuits on-property, as well as creating a whole new genre of dedicated outdoor fitness gyms.

This second-generation outdoor fitness equipment will move beyond the all-weather, rudimentary kit of old to deliver a better choice of resistance and a wider range of motion than previously.

In addition, some suppliers are already developing concepts for 'open-air' gyms, such as thé Yard, from franchise specialist, énergie Fitness – an indoor concept that has been adapted for use outdoors in sheltered spaces, such as under bridges.



PHOTO: SHUTTERSTOCK/BOBEX-78

We expect the development of a new generation of outdoor fitness equipment

NEW APPROACH TO AGEING

20. SENOLYTICS AND SENOSTATICS

The science of cellular ageing is complex, with new discoveries being made in the areas of senolytics and senostatics.

These two types of substances act on tissue to flush out old cells (senolytics) or to suppress cell death (senostatics).

Although some substances found to have senolytic effects are heavy duty drugs, such as repurposed anti-cancer molecules, it's also known that some foods – for example, those containing the plant flavonoid,

Quercetin (strawberries, apples and grapes) can remove senescent cells from the body.

As the fitness and wellbeing sectors move closer, insight into natural anti-ageing interventions will be sought after.

Health club operators are increasingly offering advice on lifestyle and nutrition, so having the knowledge to advise members and customers on the latest trends in nutrition and health will be important as we seek to widen our remit as an industry. ●



PHOTO: SHUTTERSTOCK/OLGA MILTSOVA

Certain fruits have senolytic properties

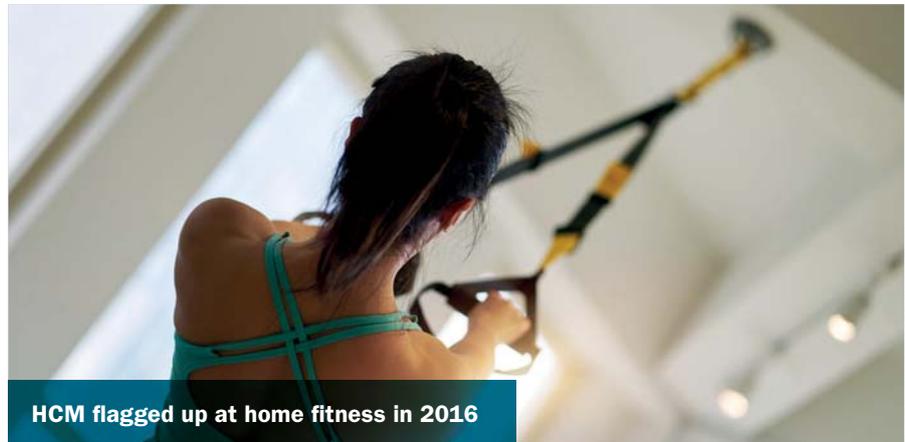
HCM Fitness Trends **archive**

2019

- TRAIN LIKE AN ATHLETE
- FRANCHISING
- LIVE STREAMING
- BOXING
- ASSISTED STRETCHING
- BONE LOADING
- ALTITUDE TRAINING
- MENTAL HEALTH SUPPORT
- REVERSE AGEING
- HOME FITNESS
- BALANCE TRAINING
- VEGAN GYMS
- BOUTIQUES
- LAST IMPRESSIONS
- EMS
- RUNNING AND PARACHUTE
- DIAGNOSTICS
- CLIMBING
- AGGREGATORS
- BLOCKCHAIN

ABOUT THE AUTHOR

Liz Terry has been writing about and analysing the global leisure industries since 1983. She's CEO of Leisure Media, which includes HCM in its portfolio of digital feeds, magazines and websites. Find out more at www.leisuremedia.com www.fittechglobal.com



HCM flagged up at home fitness in 2016

PHOTO: SHUTTERSTOCK/ALLENISMA

2018

- AUGMENTED REALITY
- EXERCISE SUPPLEMENTS
- FASCIA RELEASE
- SENSORY DEPRIVATION
- MENTAL FITNESS
- DIVERSIFIED BOUTIQUE OFFERS
- PT MEDICAL TRAINING
- EQUIPMENT HOME DELIVERY
- EXPERT EXERCISERS
- IN-HOUSE INJURY RECOVERY
- CHAKRA WORKOUTS
- CHILD-LED EXERCISE
- LEISURE CENTRE LUXE
- NATURAL ENHANCERS
- FREE GYMS

2017

- MENTAL HEALTH
- EPIGENETICS
- VIRTUAL DESIGN
- INSECT DIET
- RECOVERY
- BREATHING
- CLEAN EATING
- NON-GYM MEMBERSHIPS
- FITNESS AS ENTERTAINMENT
- ARTIFICIAL INTELLIGENCE
- MEDITATION SPACES
- FLUID GYM FLOORS
- TAILORED MEMBERSHIPS
- ACTIVE COMMUTING
- GROUP EXERCISE
- ACTIVE EDUCATION

2016

- INVISIBLES
- DNA TESTING
- BEACON TECHNOLOGY
- AROUND THE CLOCK FITNESS
- BUSINESS WITH A PURPOSE
- BIOMIMICRY
- CONTINUOUS UPGRADES
- WATER SCARCITY
- CREATING EXPERIENCES
- AN END TO CONTRACTS?
- HAEMOGLOBIN TESTING
- FITNESS NIGHTS OUT
- GROWTH OF TRAMPOLINING
- CONSOLIDATION OF THE SECTOR
- AGE-FRIENDLY DESIGN
- AT-HOME FITNESS
- MIDDLEMAN BACKLASH
- ANIMAL MOVEMENT

PHOTO: SHUTTERSTOCK/MARIDAV



Wearables were first identified as a trend by HCM in 2014

2015

- MENTAL HEALTH
- CHARITABLE THINKING
- WELLNESS CITIES
- MAKING FITNESS FUN
- EVIDENCE & DATA
- CELLULAR HEALTH
- OVER-NOURISHMENT
- FATS & CARBS
- ACTIVITY TRACKING
- VIRTUAL OFFERINGS
- LONELINESS
- CIRCADIAN AWARE
- HARDCORE FITNESS
- NEUROPLASTICITY
- OIL, GAS AND SOLAR

2014

- WEARABLE TECH
- MOBILE BIOMETRICS
- REBRANDING EXERCISE
- LAST IMPRESSIONS
- WELLNESS TOURISM
- POP-UP FACILITIES
- ONLINE REVIEWS
- SPECIALIST SERVICES
- IN-CLUB TECHNOLOGY
- HOME DELIVERY
- PEAK PERFORMANCE

PHOTO: LES MILLS THE TRIP



Virtual was on the radar in 2015

HCM

HANDBOOK 2020

INDUSTRY INSIGHTS

2020 predictions	p30
Call to action	p36
Top talent	p44
True cost	p50
London calling	p54

2020 Predictions

What's in store for the fitness and physical activity sector in 2020? We ask our panel of experts



The only sure predicted winners at this stage will be fitness consumers

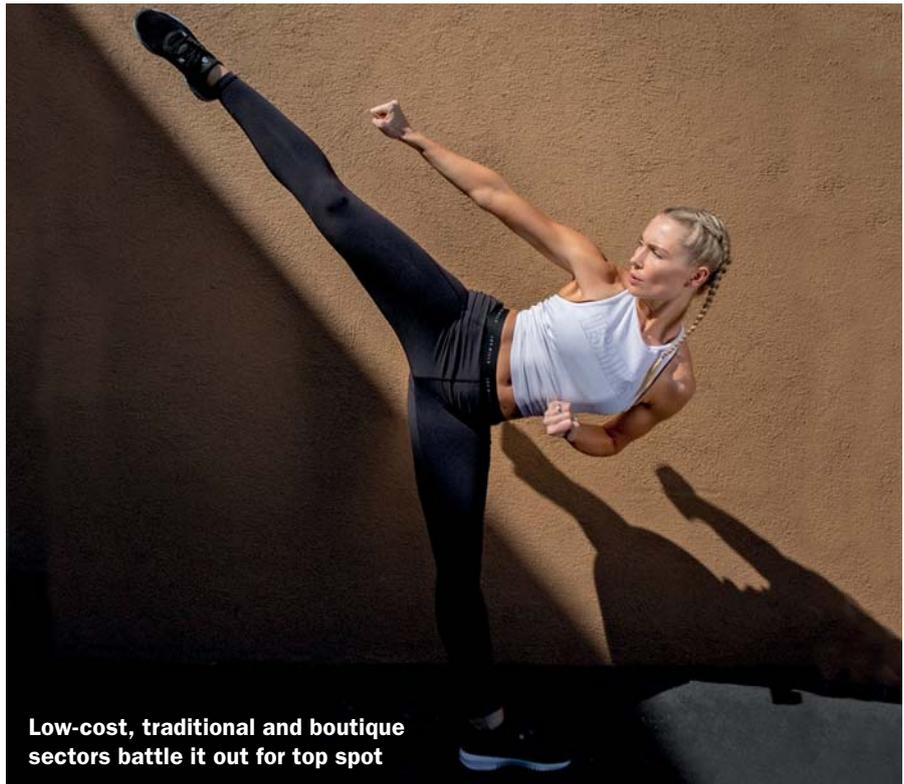
Phillip Mills
Executive Director,
Les Mills International

THE GAME IS AFOOT

There is a fascinating battle playing out right now over who will become the new industry mainstream.

Will the booming low-cost segment kill traditional, multipurpose facilities by building bigger, better clubs and adding more services like group workouts, paid for via new tiered pricing models?

Will the traditional fitness sector (for-profit and not-for-profit) successfully defend its position by shifting upscale, expanding its crucial Generation Y/Z appeal by adding boutiques, in the same way it added aerobic studios back in the 1980s – killing the aerobic studio segment in the process?



Low-cost, traditional and boutique sectors battle it out for top spot

PHOTO: COURTESY OF LES MILLS

Will boutiques – spreading exponentially owing to high-quality workout experiences, low barriers to entry and franchise models – be cannibalised by the traditional sector in the same way as the aerobic studios were? Or will the new, multi-studio boutique

models continue to grow and diversify, becoming the new mainstream?

It's a tough call, with great players on all sides. The only sure predicted winners at this stage will be fitness consumers and the health of our generation.



Basic-Fit continues to expand organically and by acquisition

Alicia Whittlecroft
Assistant Director, Deloitte
Corporate Finance Advisory

MERGE AND ACQUIRE

The high number of M&A transactions in the last few years shows the continued interest of strategic and financial investors in the UK and European fitness industry. In particular, there's been a significant consolidation trend across the industry, both within domestic markets but more recently cross border within Europe.

Two of Europe's largest budget operators – Basic-Fit and PureGym – have continued to expand their portfolios both organically and via acquisitions, enabling them to grow at a quicker pace and in different locations. The focus continues to be on expansion across Europe to gain a market leading



We expect more consolidation in the mainstream markets and continued investment into organic growth in boutiques

position in certain geographies. Examples include Basic-Fit's acquisition of Fitland, giving them a market leading position in the Netherlands, and PureGym's recent acquisition of Fitness World, giving them a market leading position in Denmark. Whilst both acquisitions were debt funded, both

operators have excellent access to capital; PureGym via their well-funded PE backer and Basic-Fit via their stock market listing.

At the opposite end in terms of scale, boutiques have continued to gain traction in their local markets, with many operators expanding on a site-by-site basis through franchise or owned sites. In the last few years, several of these operators have been able to secure capital from larger investor sources. We predict this trend will continue as many more investors look to capitalise on this growing and popular segment.

Going forward, we expect more consolidation in the mainstream markets (budget and premium) and continued investment into organic growth in the boutiques. The winners in each sector will not only need to be the best operators but will also need to secure the right access to funding in this capital intensive industry. ▶



The sector needs to create specific membership categories for Gen Z, with bespoke marketing creatives alongside on trend fitness offerings

► **Mike Hill**
Director, Leisure-net Solutions

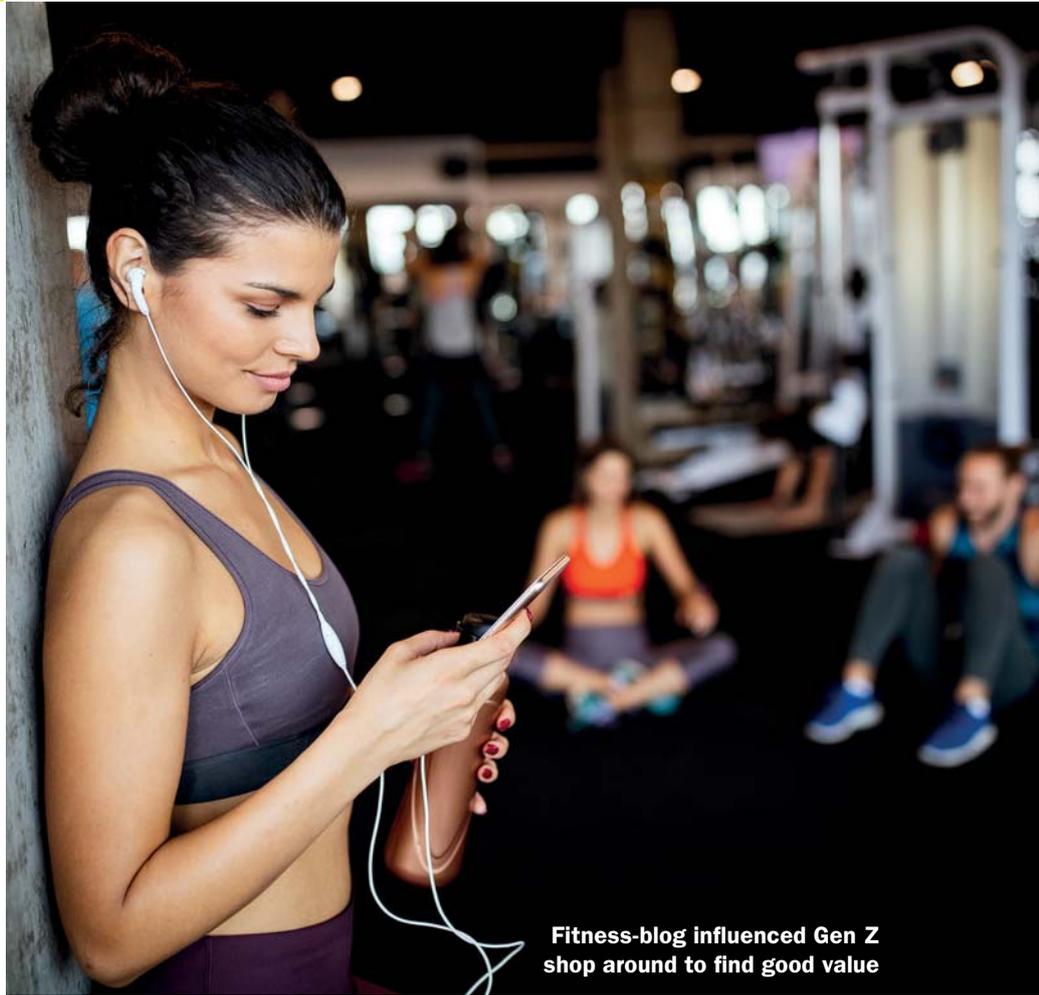
OPPORTUNITY GEN Z

Are Generation Z (16-25 year olds) the sector's next big challenge? Our research, pulled from thousands of non-user surveys, suggests so. We found that time, motivation and direct costs are more important factors for Gen Z than other age groups, yet they're 25 per cent more likely to be in contemplation or pre-contemplation mode.

We know from previous research that this generation tends to be more concerned with their appearance and body shape. Gen Z is also more health conscious than millennials. Living their lives online, their main role models are public figures and brands that talk to them online. They gain knowledge online about the exercises they want to do and the kit they need for it. Their expectations are high, and they're prepared to shop and move around, using

their online skills to make comparisons and find the best deals.

The health and fitness sector needs to create specific membership categories to cater for Gen Z, with bespoke marketing creatives alongside fresh and on trend fitness offerings, designed to appeal to this group of early adopters. It should also work with fitness bloggers to generate inspirational content and use SMS to push out offers and promotions.



Fitness-blog influenced Gen Z shop around to find good value

The main pain point for Gen Z is money, and remember that 86 per cent of Gen Zs read a review before making a first-time purchase. They want to know that people like them are enjoying 'our' experience. But Gen Z are not loyal. We need to demonstrate good value or they will go elsewhere, and we will miss a big opportunity to get this age group into a regular exercise habit, hopefully for the rest of their lives.



Artificial intelligence will enhance the 'eyes and ears' of lifeguards

Mark Sesnan CEO and MD, GLL

BEAT THE CROWDS

Bricks and mortar leisure providers in 2020 will face a challenging trading environment with headwinds from Brexit and increasing competition for disposable income from home-fitness brands, e-game innovators and experience providers popular with millennials.

But there are also huge opportunities for those who are agile enough to evolve their offer or able to draw upon a strong and loyal customer base in the local community.

This year could see some struggling big-name providers merge. There could



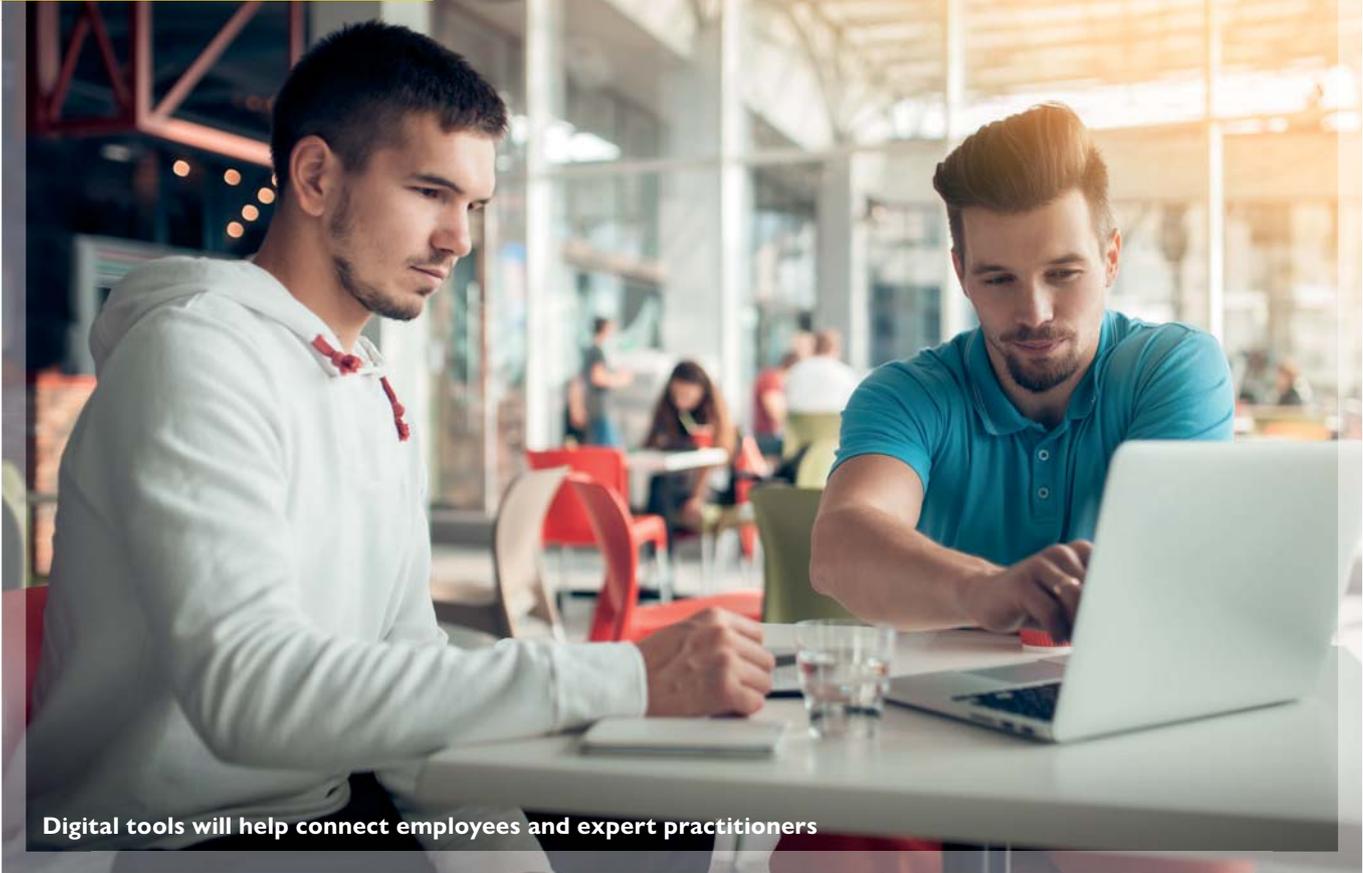
There are huge opportunities for those agile enough to evolve their offer or draw upon a strong and loyal customer base in the local community

also be an increase in the number of high street boutique gyms and healthy lifestyle offerings (including yoga and pilates), as

shop fronts are freed-up by a move to online shopping. Mid-market providers will also continue to feel the squeeze.

In the year ahead, all providers will be looking to differentiate themselves in a crowded market, so look out for some high-spend advertising campaigns aimed at winning the hearts and minds of customers.

According to Swim England, swimming is the nation's 'go to' leisure activity for families. So look out for more pool providers offering family-friendly courses teaching this vital life skill as well as entertaining pool-play activities that maximise wet-side income streams. Artificial intelligence will also be increasingly used to make pools safer by enhancing the 'eyes and ears' of lifeguards poolside. ▶



Digital tools will help connect employees and expert practitioners

PHOTO: SHUTTERSTOCK/ GOAMI

► **Mark Verstegen**
Founder and CEO, EXOS

FRINGE BENEFITS

In 2020, we'll see organisations go beyond providing a bunch of wellness amenities to their employees; instead focusing on quality over quantity.

Basic wellness offerings will continue to play an important role in corporate wellness programmes. However, employers increasingly are realising that in order to help people create transformative changes, they need to help them commit



Employers will opt to implement a small number of high-quality programmes with the intent of making a bigger difference in people's lives

to something and sustain that commitment. And in order to do this, the role of the practitioner is paramount.

Digital tools will support rather than replace real human connections between employees and expert practitioners. Qualified practitioners can guide employees and engage them on a personal level to help them stay motivated, experience real health outcomes, and attain the goals that matter most to them. Employers will opt to implement a small number of high-quality programmes with the intent of making a bigger difference in people's lives, attracting and retaining talent as a result. ●

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Beginner
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MONDAY 20 MAY 2019, WEEK 21

	160 CM Height	66.3 KG Weight
	38 CM Shoulders	101 CM Chest
	96 CM Waist	99 CM Hips



CHATS **PROGRESS**

Karen Leussen 08:12
I have compiled a couple of documents from our conver... >

Coen Paulo Yesterday
The upcoming lesson is >

I have compiled a couple of documents from our conversation last week and set them ready. I hope you going to succeed.

I saw them passing by. When do you want me to start with them? Then I can put them in my personal agenda

GOOD MORNING
ALEX

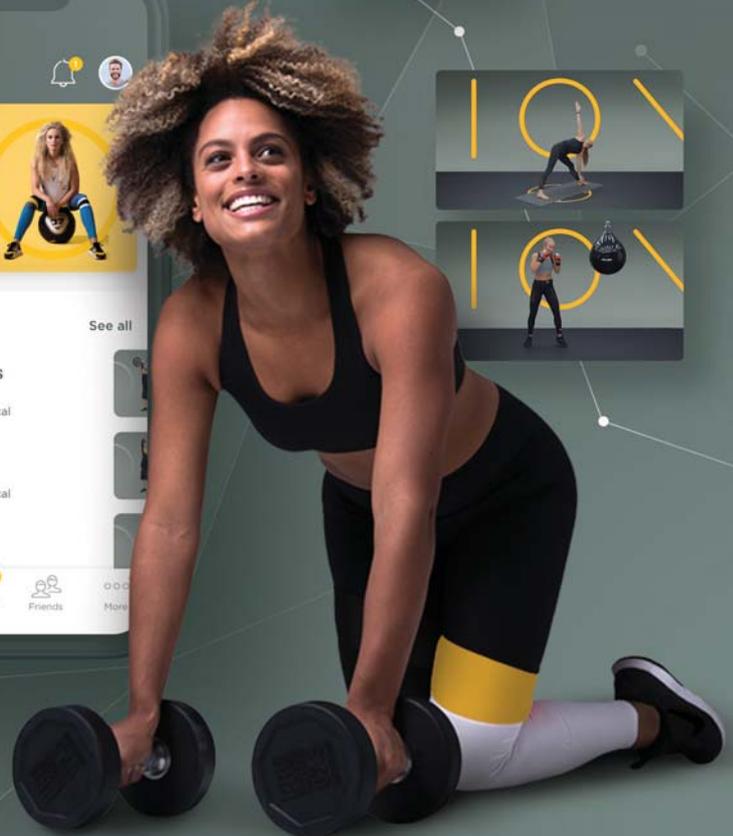
GET THE MOST OUT OF YOURSELF
Get a coach and find out!

LET'S GET STARTED!

TOP PICKS FOR YOU See all

- Beginner**
7 BARBELL MINUTES
★★★★★
🕒 7 min 🔥 100 cal
- Intermediate**
TAKE 10
★★★★★
🕒 7 min 🔥 100 cal
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OUT OF THE BOX
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Training Calendar My Coach Friends More



FUNXTION
INTERACTIVE DIGITAL FITNESS

INDUSTRY INSIGHTS

Older adults hold 70 per cent of the nation's wealth yet only 11 per cent of leisure centre members are age 55-64

Call to ACTION

Tapping into the over-55 market is proving lucrative – the perfect opportunity to customise fitness activities and PT qualifications for your older members.

Utku Toprakseven analyses the latest *Moving Communities* report

Figures published in the *Moving Communities: Active Leisure Trends 2019* report uncovers insights into how the industry is attracting, retaining and interacting with older members.

This third annual report from the ukactive Research Institute and DataHub analyses the trends driving public leisure in the UK. It reveals that while the proportion of older members has increased only slightly over the past two years (from 7 to 8 per cent of the population), there's still a major opportunity to attract older customers to use your leisure facilities.

In the last three years, there's been a gradual increase in the total 55-plus membership base – 19 per cent in 2017, 21 per cent in 2018 and 23 per cent in 2019 – but when you consider that this cohort accounts for 37 per cent of the UK population, these figures remain low.



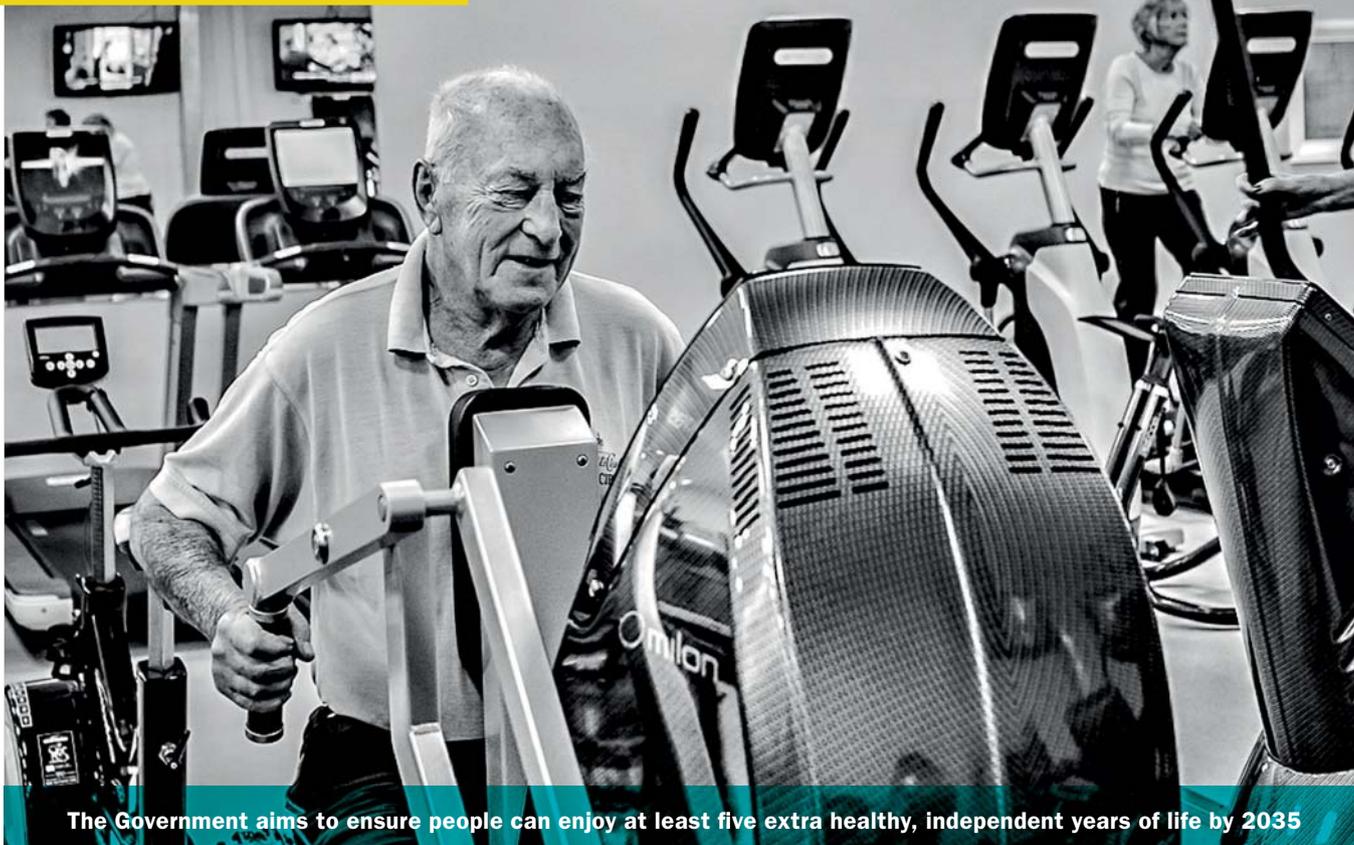
More is being done to promote physical activity to older people than ever before, but we're at the start of this drive

Huw Edwards, CEO, ukactive

THE POTENTIAL TO ENGAGE

Using data collected by DataHub from more than nine million members and 246 million individual visits across 53x4 leisure centres over the past three years, the *Moving Communities* report offers an unparalleled snapshot of the 2019 leisure and fitness landscape.

The previous 2018 report showed that engagement levels among older people weren't even close to meeting their potential – adults over 65 accounted for



The Government aims to ensure people can enjoy at least five extra healthy, independent years of life by 2035

▶ just nine per cent of visits. Backing this up, the *Reimagining Ageing* report released at the 2018 ukactive National Summit also revealed that 38 per cent of over-55s are inactive, rising to almost half (48 per cent) of over-75s and 71 per cent of over-85s. The report called for greater collaboration to reimagine what ageing looks like.

Government is clearly keen to invest. In early 2019 it announced a new initiative – The Healthy Ageing Investment Accelerator – to distribute £12m worth of grants to small- and medium-sized enterprises that aid healthy ageing, including those involving physical activity. This project will support the UK government’s mission to ensure



To rebalance this segment, we need to use data and insight to engage participants in a targeted, personal way

Ed Hubbard, DataHub/4global

people can enjoy at least five extra healthy, independent years of life by 2035.

CASH IN ON OPPORTUNITY

Despite this call to action, older adults – who hold 70 per cent of the nation’s wealth – remain unengaged in physical activity. By 2030, it’s estimated there will be 20 million UK residents over 60, yet *Moving Communities* reveals only 11 per cent of leisure centre members are 55-64. Just three per cent are over 75.

“We all know we’re living longer, but those extra years are increasingly blighted by illness and frailty – we need to reimagine ageing,” says Huw Edwards, CEO, ukactive.



We have a 50+ group called The Invincibles who meet to exercise and socialise. Many members have lost partners and live far away from family, so the group provides a lifeline

Ian Davis,

Wellington College Enterprises

“The (*Moving Communities*) report demonstrates that the average age of members is increasing, from 39 in 2017 to 41 in 2019, suggesting the sector is starting to take advantage of the opportunity presented by an ageing population.

“More is being done to promote physical activity to older people than ever before, but we’re at the start of this drive; it’ll take years of targeted engagement to achieve meaningful results. These initiatives show a clear direction of travel, one that ukactive will be championing during the coming years as a core pillar of our work.”

Ed Hubbard, principal consultant at DataHub/4global, suggests a better understanding of what older adults want would help operators engage them.

“For too long, the sector has grouped ‘older’ as everyone over 55. But offering a 60-year-old the same programming as an 80-year-old is like treating a 20-year-old



Oldham Community Leisure actively targets over-55s living locally

TABLE 1: CORE ACTIVITY VISITS BY AGE GROUP

AGE	SWIMMING	GROUP EXERCISE	FITNESS
16-24	8%	23%	57%
25-34	15%	27%	44%
35-44	19%	30%	35%
45-54	20%	38%	31%
55-64	26%	36%	27%
65-74	30%	29%	29%
75+	27%	19%	40%

and 40-year-old the same. If we’re to rebalance this segment, we need to use data and insight to engage participants in a targeted, personal way.

“Whether it’s understanding how to support adult-only swimming with personal training or identifying the best marketing channels for older adults, our Data Analytics and Insight service gives a clear idea of the market opportunity and specific programmes that improve older member acquisition and retention.”

THE INVINCIBLE LIFELINE

Wellington Health and Fitness Club in Berkshire currently excels in this field – the majority of its members are over 50, with 894 aged 60-79 and 133 aged 80 to 99. Eleven are over 90.

Ian Davis, commercial manager of Wellington College Enterprises, which manages the club, says: “We have a long-running 50+ group called ‘The Invincibles’ – 483 members who meet three times a week to exercise and socialise. ▶



Younger people joining the fitness industry need to be educated to avoid pigeonholing by age

► Everyone's given free membership on their 90th birthday and we celebrate 80ths too. Many of our members have lost partners and live far away from family, so the group provides a lifeline."

Davis says finding appropriately trained staff is challenging. "There are consequences to having older members, purely because of their physical attributes. Some struggle with mobility, some dementia, others find negotiating kit hard. This creates a duty of care from a club to them, other members and staff. It's a moral dilemma; we know how important the gym

is to our older members, but no useful training or qualifications are available."

Davis believes specific training to work with older adults would enable instructors to confidently produce tailored fitness interventions for ageing members.

"In the months since *Reimagining Ageing*, numerous training providers have already committed to supporting older people to train as exercise professionals," says Edwards. "David Lloyd, for example, is employing at least one instructor aged 55 and over at every one of its 90-plus sites. At the same time, CIMSPA has also

accredited training that will support professionals to work with individuals with long-term conditions."

Elaine Briggs, director of education, Training and Innovation at Future Fit Training, argues this doesn't go far enough. "Training providers can only deliver qualifications set by awarding bodies that meet professional standards set by CIMSPA. These need revisiting; updating for the new, older generation," she says.

"Let's be clear – over 55 isn't 'old'. Kylie is 50, Madonna is 61 – we don't see them as old! We need to revisit the language we



Specific training to work with older adults would enable PTs to confidently produce tailored fitness interventions

PHOTO: SHUTTERSTOCK/ KZENION

use, give the qualifications a shake-up and the age brackets a re-think.

“Younger people coming into our industry need to be educated so they don’t pigeonhole people just by age. You can get a very fit, active 65-year-old or an overweight, inactive 20-something; the fitness training you’d advise each to do is so very different, as is the communication style you’d use.

“Age is irrelevant; the things we qualified as ‘specialist’ a few years ago are now the norm for many exercisers, and instructors need to be qualified across the board.”



We need to revisit the language we use, give the qualifications a shake-up and the age brackets a re-think

Elaine Briggs, Future Fit Training

CUSTOMISING FITNESS

Moving Communities highlights how exercise preferences change with age (see Table 1). Younger members favour the gym (57 per cent), group exercise is more popular with older members, and swimming accounts for eight per cent of 16-24 year old’s visits compared to 30 per cent of 65-74 year olds. Sport preferences also change (see Table 2). Badminton is popular across all ages until 65, when health and wellbeing takes top spot, encompassing assessments and consultations with staff, GP referrals and rehab sessions. ●

► “For us, working with people classed as older is about mindset,” says Jackie Hanley, health and wellbeing manager at Oldham Community Leisure (OCL). “We actively target over-55s and it all starts in the local community. I do presentations to groups we want to encourage into our centres. If I talk about physical activity, people switch off – their perception is they’re too old to exercise. I create a conversation around moving and socialising; nudging people towards small lifestyle changes.”

Hanley says that once they’re exercising, they’re hooked: “For older members, exercise rapidly becomes a mindset, then they keep coming back. Some of OCL’s chair-based class goers are in their 90s; they’ve been coming for years.”

Being specific about what’s on offer, then communicating this with potential participants is key, says Hubbard: “Our data shows us older members clearly favour late mornings (49 per cent of over-65s visit from 9am to 12pm) and the 65-74 group wants Pilates and yoga (Table 3). If operators use this insight to inform programming, marketing and staffing, the offer for older adults can be improved and communicated more effectively.” ●



PHOTO: SHUTTERSTOCK/ PRESSMASTER

Badminton is the most popular fitness activity for both sexes from age 55-64

TABLE 2: MOST POPULAR SPORTS / ACTIVITIES FOR EACH AGE GROUP

55-64	Female	Badminton	Health & Wellbeing	50+ activities
	Male	Badminton	Squash	Health & Wellbeing
65-74	Female	50+ activities	Health & Wellbeing	Badminton
	Male	Health & Wellbeing	Badminton	Bowls
75+	Female	50+ activities	Health & Wellbeing	Bowls
	Male	Health & Wellbeing	Bowls	Badminton



Utku Toprakseven is the director of DataHub – the UK’s largest repository of sports and leisure sector data

Sources:

- Moving Communities: Active Leisure Trends 2019 Report
- Moving Communities: Active Leisure Trends 2018 Report
- Reimagining Ageing 2018 Report
- ONS Mid-Year Estimates 2017

TABLE 3: MOST POPULAR GROUP WORKOUTS FOR EACH AGE GROUP

55-64	Female	Aerobics	Pilates	Yoga
	Male	Indoor Cycling/Spin	Aerobics	Yoga
65-74	Female	Aerobics	Pilates	Yoga
	Male	Aerobics	Indoor Cycling/Spin	Circuits
75+	Female	Aerobics	Pilates	Health Classes
	Male	Aerobics	Health Classes	Circuits



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Top TALENT

Fitness operators savvy enough to financially reward exemplary exercise instructors benefit from strong retention and membership rates. Finlay Macdonald from Les Mills shares his insights

If a single great instructor can attract and retain hundreds of members to a health/fitness club over time, it stands to reason that a team of instructors can transform an entire club's future. Conversely, a club that ignores or undervalues instructor quality risks alienating members and undercutting its own financial performance. Yet many clubs continue to do just that.

INVEST IN INSTRUCTORS

According to research white paper *The Impact of Instructor Quality In The Physical Activity Sector* (May 2019), many club operators are still failing to grasp the true impact great instructors can have on performance – and weakening their bottom line as a result.

Prepared by Les Mills and not-for-profit health body ukactive, the white paper pulls together insights from a range of fitness industry experts, including mainstream and boutique operators, academics, training providers and multiple industry bodies.

The report also looks at relevant in-club examples where operators saw class

attendances and retention rise markedly after investing in greater training and pay for instructors.

The white paper delivers five key insights for club operators:

- 1 Instructors continue to play a central role in the success of clubs, from member retention to marketing. Many members are more loyal to their favourite instructor than to a facility.
- 2 Group workouts are key to the future of clubs: classes are a major selling point for the new generation of gym members, with 52 per cent of millennials and 50 per cent of Gen Z members engaging in group workouts to enjoy the social benefits of 'the group effect'.
- 3 Development of 'soft skills' should not be underestimated: the industry must close the skills gaps at the qualification level and invest in quality in-house training and CPD for instructors.





Instructors are central to the success of fitness clubs as group classes become increasingly popular



Class instructors can share their up-to-date and first-hand insights into the gym member experience

- ▶ **4** Rewards and recognition: while pay is not all that instructors care about, rates have barely increased in 20 years and remain a significant motivator (or demotivator). Operators should explore ways to reward their instructors, not just through increased pay, but also by investing in education and other nonfinancial rewards.
- 5** Retaining high-quality instructors remains significant for clubs: they possess up-to-date and first-hand insights into the member experience, which operators can harness to understand and improve the member experience and boost retention.

INSTRUCTORS PAY DIVIDENDS

“Instructor pay remains one of our sector’s biggest challenges and it’s where boutiques

have stolen a march on traditional clubs,” says Phillip Mills, Les Mills International Executive Director.

“US\$27 is still the average instructor fee per class in a traditional club – this has barely changed since the 1980s. It’s difficult to recruit a new generation of rock star instructors when personal training and boutiques pay two to three times as much.”

But Mills says there’s a win-win solution that links pay to qualifications and results. In August 2019, Les Mills launched its new Group Fitness Management (GFM) training programme which shows in detail how clubs can achieve just that.

The GFM programme notes that, firstly, current challenges have to be acknowledged. Instructors in traditional clubs are often paid considerably less than the average hourly fee charged by personal

trainers, which is exacerbated when you factor in the travel, preparation and set-up time group fitness instructors must invest in, delivering their classes for no extra pay.

This issue makes it increasingly difficult to attract new talent into the fitness industry. The *2018 IHRSA European CEO Study Report* surveyed 86 European health club leaders and found that recruiting and retaining great people was still their number one challenge. The resulting smaller talent pool intensifies competition among clubs and drives up the market value of those standout group fitness instructors who can pull in hundreds of loyal followers each week, driving substantial extra revenue for their club.

This effect has been amplified by the boom in boutique gyms, which have thrived by focusing on specialised group fitness experiences and charging upwards of



Operators should reward group class instructors by investing in their education and training



“ *Instructor pay remains one of our sector’s biggest challenges and it’s where boutiques have stolen a march on traditional clubs* - Phillip Mills

US\$50 per class. These higher margins have allowed them to better reward top talent, with standout boutique instructors able to command upwards of US\$100 per class.

HANG ONTO INSTRUCTORS

So what can traditional health clubs do to better remunerate their top instructors and ensure they aren’t snatched away by boutiques in this highly competitive market?

1 SUPERSIZE THE STUDIO

One of the biggest untapped assets for traditional clubs is the space they have

to create a jumbo group exercise studio. Research has shown that the studio is the most profitable area of the club when built at the right scale (see Figure 1), so those clubs willing to be bold can yield impressive results. Adding virtual classes into the programming mix can also help spread usage and provide off-peak class options for members.

2 PAY ON PERFORMANCE

By unlocking the economies of scale that come with a bigger studio, clubs can afford to properly pay top instructors and ►



Incentivise instructors with pay related to how well they fill their classes to encourage social media engagement

► counter the threat of them being poached by boutiques. Either way, clubs can still incentivise instructors with pay related to how well they fill their classes.

Packed classes mean more members joining and staying for longer, with increased revenues allowing greater investment in instructors. In turn, they're more likely to invest time and effort marketing their classes through their own social media channels.

3 INVEST IN THE TEAM

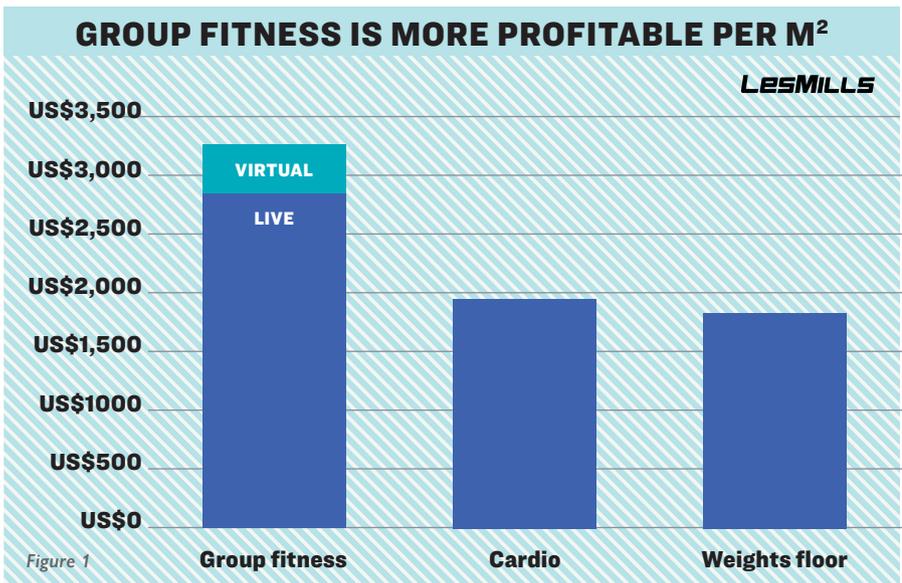
Club operators are already seeing strong return on investment from focusing on instructors, as evidenced by UK chain Village Gym.

Village's 30 high-end health clubs saw class attendances jump by up to 40 per cent thanks to a recent focus on upskilling group fitness instructors through Les Mills Advanced Training. Member retention also went up (by an average of 5-10 per cent per month), as did referrals, meaning the better-qualified instructors could receive higher rates of pay. In turn, this led to better instructor engagement and a long list of talented trainers eager to join the Village Gym team.

4 SMART TIMETABLING

For those limited by space, there are timetable opportunities to unlock extra cash and reward top instructors.

For example, research has shown that indoor cycling is the most lucrative activity (per square metre) – and it's one of the hottest categories among consumers. Findings from the 2019 Les Mills Global Consumer Fitness Survey (involving 12,000 fitness consumers across 22 countries)





Unite your instructors under a powerful purpose, set challenging goals and build camaraderie through social activities

indicate that 20 per cent of global consumers are doing or would consider doing indoor cycle classes.

5. MONEY ISN'T EVERYTHING

Even with the best will in the world, a fitness/health club's budget can't always stretch to accommodate increased rates of pay for group fitness instructors. But there are still many other options a club can take to ensure their instructors feel valued and rewarded.

Motivation is the fuel that fires a high-performing group fitness team. Uniting them under a powerful purpose, setting challenging goals and building

camaraderie through social activities in another way to add a strong sense of fun to a team's journey.

Rewarding high performers with opportunities for training and development can also help spark a continuous cycle of improvement. Finally, one of the commonly overlooked factors in motivating a team is simply serving as a good coach who clearly cares about growing their skills and developing them.

THE BOTTOM LINE

In summary, there are a variety of ways clubs can leverage instructor quality to improve both the instructors' own

experience and improve the health of the overall business. Instructors are an integral part of the brand. Pay will continue to be an issue – and must be addressed wherever possible – but working together to nurture a stronger culture and better environment for group class instructors will benefit customers, the club's brand, and ultimately the bottom line of your club. ●



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The cost of modern day inactivity while travelling, working or winding down drains the economy

PHOTO: SHUTTERSTOCK/ PRESSMASTER

True COST

Andre Nepgen shares the results of Vitality and RAND Europe's global study on the economic impact of physical inactivity



If the physically inactive were to reach the World Health Organisation's recommended minimum levels of exercise, employees would gain up to five additional days of productivity per year and the global economy would grow by an estimated \$220bn annually

Andre Nepgen

Much of modern life is spent sitting, whether travelling, at work or winding down at the end of the day. What's the price of all this inactivity? The numbers might shock you.

In November 2019, Vitality and RAND Europe published a groundbreaking global study on the economic impact of physical inactivity, illustrating the significant influence of regular exercise on economic growth, workforce productivity and life expectancy.

The study found that the world's GDP would gain more than \$100bn each year until 2050 if people took part in just one of these daily activities:

- walked 15 minutes more
- slow jogged for half a mile (one km)
- took 1,500 extra steps

PROMOTE PRODUCTIVITY

Further findings show that if the physically inactive were to reach the World Health Organisation's recommended minimum

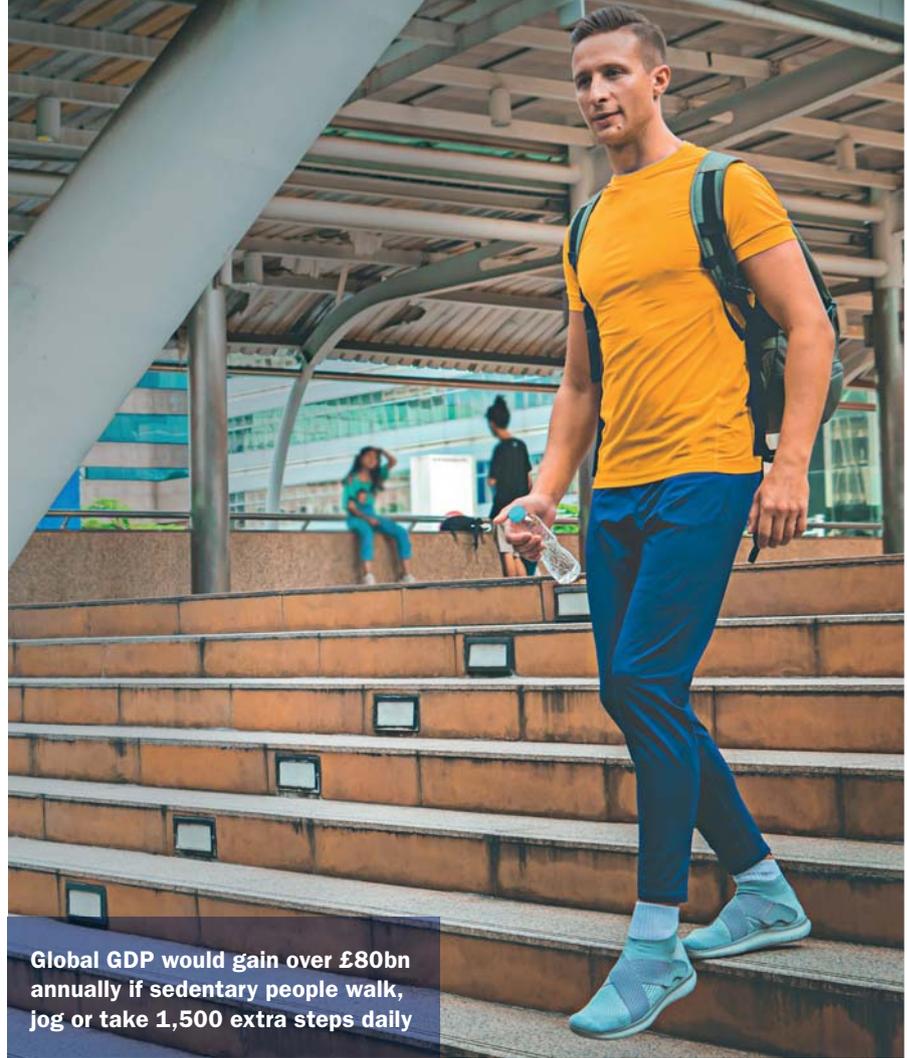


PHOTO: SHUTTERSTOCK/ANUTR YOSSUNDARA

levels of exercise (150 minutes of moderately intensive exercise per week), employees would gain up to five additional days of productivity per year and the global economy would grow by an estimated \$220bn annually.

In addition to getting inactive people active, if currently active individuals boosted their physical activity levels by 20 per cent, the global economy could grow by more than \$360bn every year; equivalent to the size of Singapore's economy. Economic gains for the US economy would be \$95bn

a year until 2050, and \$11bn a year for the UK economy.

These economic gains would be attributed to the reduction in premature deaths within the working age population, reduced sick leave and improved levels of workplace productivity – driven largely by the positive impact of physical activity on mental health.

HEALTHY PERFORMANCE

Researchers at RAND Europe utilised Vitality's extensive proprietary dataset



PHOTO: SHUTTERSTOCK/IGOR PALAMARCHUK

Physically inactive 40-year-olds could add at least 2.5 years to their lives simply by jogging for 20 minutes a day

- ▶ on workplace health – derived from its Healthiest Workplace initiative in seven countries – to assess the relationship between physical activity and performance at work. It also combined the mortality and productivity effects into a single model to project the true economic cost of physical inactivity over time.

It analysed three scenarios that sketch a global picture of how increased physical activity can benefit not only individuals but also businesses and global economies.

As forecasts of a global slump persist, the price of sedentary lifestyles is sobering. By exercising more, people take far fewer sick days and live longer. Physically inactive



As forecasts of a global slump persist, the price of sedentary lifestyles is sobering. By exercising more, people take far fewer sick days and live longer

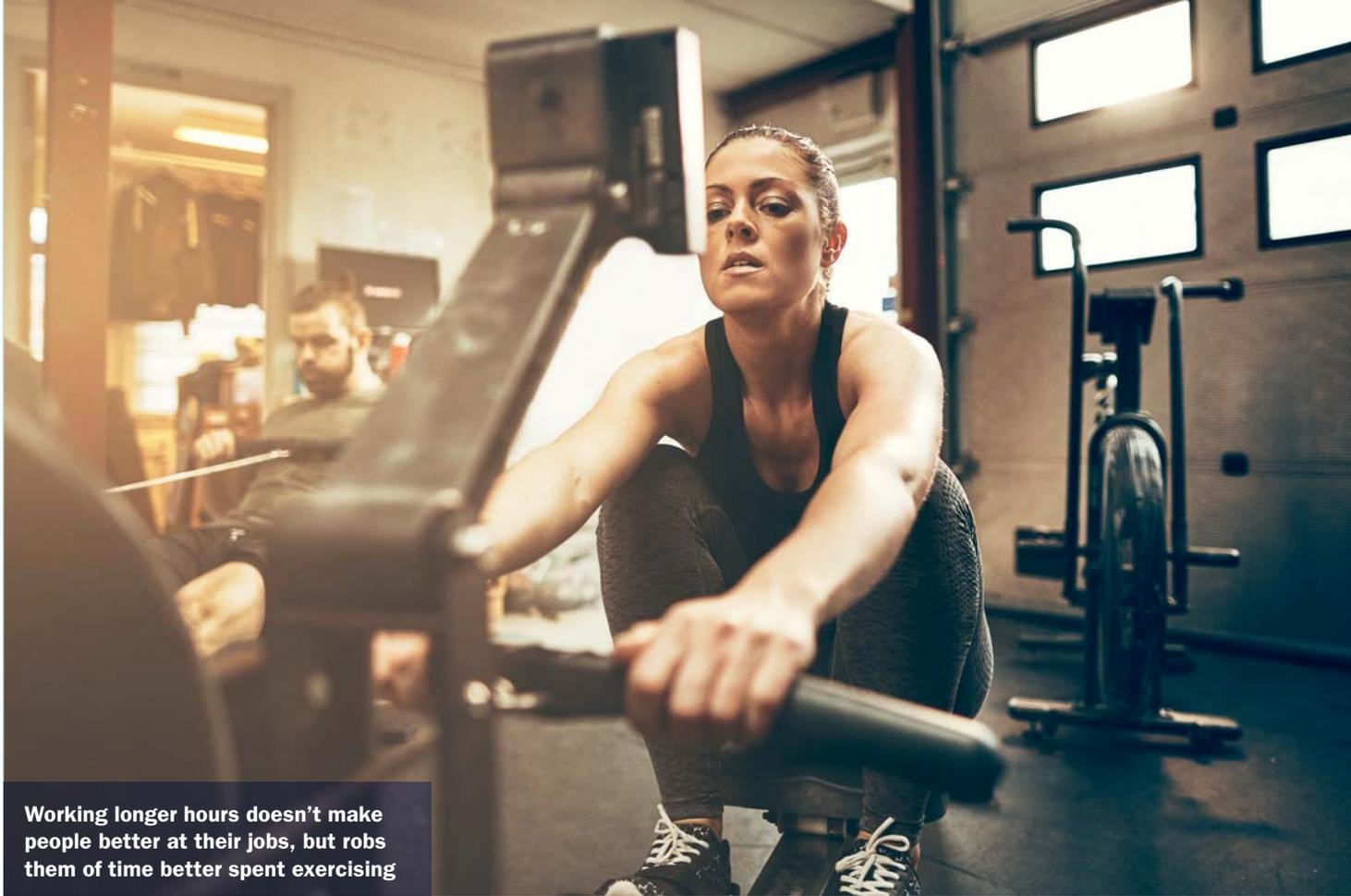
40-year-olds could add at least 2.5 years to their lives simply by jogging for 20 minutes a day. And exercise is not only just good for our physical health; it provides significant

benefits for our mental health too, enabling us to work more productively.

In cold economic terms, a greater amount of exercise would mean that more people could work more productively across more days. And the pay-off for the individual? A happier, healthier and wealthier life.

INCENTIVISE EMPLOYEES

Over 20 years ago, Discovery set out to transform the insurance industry by incentivising people to live healthier, more active lives. It does this through Vitality, a science-based behavioural change programme that encourages healthy activity



Working longer hours doesn't make people better at their jobs, but robs them of time better spent exercising

among members and rewards them for it. Incentives range from a free weekly coffee or cinema tickets for achieving a certain number of steps each week to an Apple Watch for consistently meeting their personal exercise goals.

Studies have proven that people can be incentivised to move more – and that has a benefit to them, the businesses they work for and wider society, because the healthier people are, the less burden they place on public services. Discovery calls it 'shared value.' Discovery has partnered with leading insurance companies around the world by integrating Vitality into their offerings to make tens of millions healthier. The insurers

connected by Vitality are committed to encouraging positive behaviour change to not only drive individual improvements but also offer sustainable solutions to global challenges like inactivity – as evidenced by their collective commitment to make 100 million people 20 per cent more active by 2025. This study shows the massive benefits of that approach.

CORPORATE CULTURE SHIFT

However, this can't be done without a broader corporate culture shift – one that prioritises the physical and mental wellness of its people. Tackling the perverse trend of presenteeism is a good place to start.

Working longer hours doesn't make people better at their jobs, but it does rob them of precious minutes and hours in the day. This time would be better spent exercising. Today's leaders have a responsibility to encourage their colleagues to have a healthy work-life balance. This benefits the individual, the company and, more broadly, the economy. ●



Andre Nepgen, Head of the Global Vitality Network at Discovery Limited
www.vitality.co.uk

LONDON calling

Leisure Database's David Minton rounds up some of the most promising boutiques bringing something new and unique to the capital's fitness scene

Boutiques are a change, not a trend, and the public and private health and fitness sectors are responding with their very own offerings, either disrupting themselves by creating new concepts or partnering with existing operators.

At the top end, **David Lloyd Leisure** launched **Blaze**; so successful that their first standalone studio has now opened in the city of Birmingham.

In the mid-market, **Bannatyne** have taken the **Speedflex** concept in-house, whereas the low-cost market has seen **énergie** creating **Yard** to add value to their offering.

In the public sector, **Everyone Active** are pushing towards a 'boutique in a big box model', with the opening of their first **F45** studio partnership in Maida Vale, London, at the end of 2019.

Everyone Active's also secured a partnership deal with **MoreYoga**, and 2020 will see them launch their new boutique format **Fortis**, powered by Speedflex.

With boutique studios continuing to disrupt and re-shape (no pun intended) the industry over the past 12 months, I joined my team at The Leisure Database Company to try out as many of the new boutique concepts as we could cram in. In no particular order, here's our highlights.



Blazing a path with its first standalone club

NEW OPENINGS

Boom Cycle opened their fifth studio at Waterloo in September. We all got up early one morning to ride with the 'badass on a bike' – Hilary! With her special LA style of riding, I was taken back to West Hollywood and **Cycle House**. A great start to the day!

Lift: The Movement in Shoreditch opened over the summer. The Olympic-style gymnastic rings provided an upper

body workout that develops strength, balance and control. A different yet very enjoyable class with a trainer who clearly knows his stuff. We couldn't have done those rings without you!

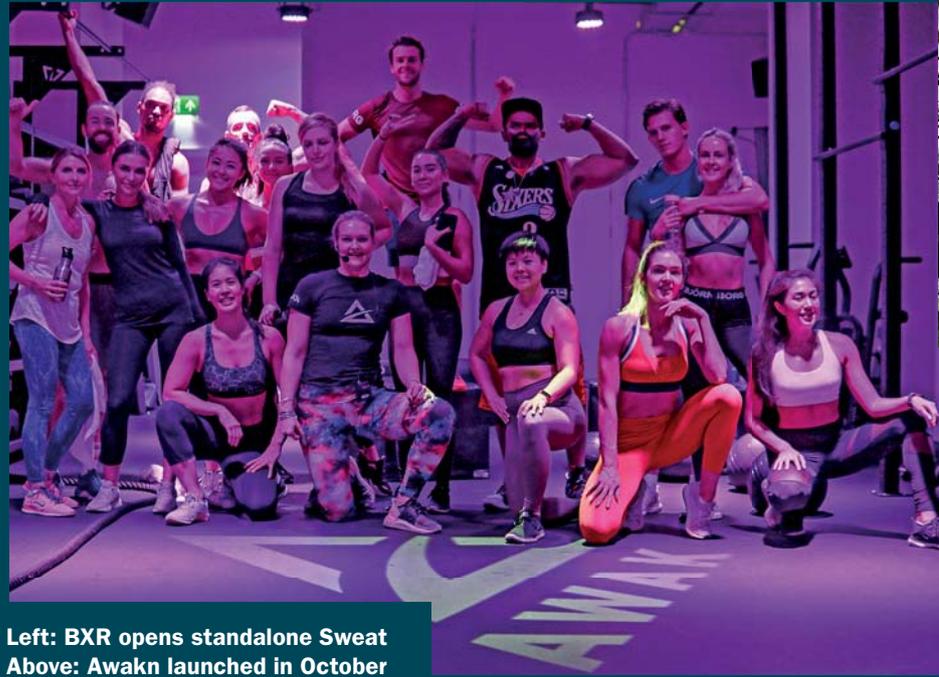
BLOK ventured outside of London with their Manchester site opening back in September, but we kept it close to home and hunted down the first **BLOK** at the old tram depot in Clapton. The former industrial buildings have been



Clockwise from top left:
BoomCycle, MoreYoga,
BLOK and Fortis by Speedflex



PHOTO: MAX OPPENHEM



Left: BXR opens standalone Sweat
Above: Awakn launched in October

► turned into stunning workout spaces with atmospheric surroundings.

I was an early adopter of **BXR** in Marylebone, and September saw the opening of their first standalone studio, **Sweat**, in Canary Wharf above the soon-to-open Crossrail train station. If you love the Versaclimber and its total body workout, then this one is for you. You'll find **Sweat** next to **Barry's**, on the former **Psycle** site.

Also in Canary Wharf is **Awakn**, where we joined the Gladiator class taken by a former Strongwoman World Champion. This studio opened in October, and what a workout! We've also been back to do the Box & Lift class which was loved all round.

In the City of London, close to Bank station, **The Foundry** opened on the former Speedflex site in July. It's become a firm

“ Boutiques are a change, not a trend, and the public and private health and fitness sectors are responding with their very own offerings

favourite among the team, particularly the City Strongman Class (which can be enjoyed by all) and the Combine team-based class which brought out our competitive nature! We just keep going back for more.

You could say some of the team have become regular “Framers”. **Frame** opened their Angel studio in November and, across the brand, we found Reformer Pilates to be our favourite class.

Flykick on Euston Road opened in 2018 and we love the kickboxing concept that results in a tough but fun full body workout.

In 2019, **Flykick** added a second studio to the site, so we returned to try out their new Strength class; it gets another thumbs up from us.

The **Fore** brand opened in a really cool studio on the exciting Kings Cross development over last summer (previously known as **Equilibrium**).

The class consisted of a unique mix of **Skillmills**, TRX and Rip Trainers where the emphasis is on speed, rotation and resistance. Group classes, Personal Trainers, therapies, café and co-working, I'd be happy to move in. ►



Clockwise from top left:
The Foundry,
Barry's
Bootcamp,
Cirq, Frame and
FlyKick fitness
boutiques



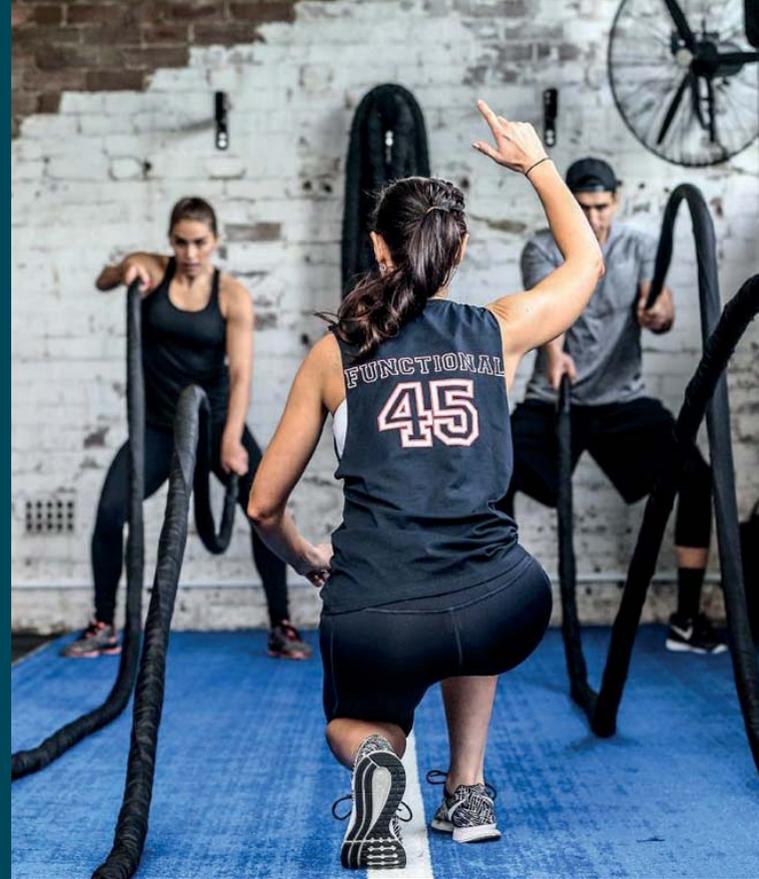
RESEARCH ROUND-UP



Clockwise from top left: Digma, Psycle, Rumble and Barrecore offer Londoners so much choice



Left: SoulCycle; Right: F45 is the fastest growing fitness franchise



► **CIRQ** opened on Fleet Street in the City of London and we went in September for the opening week to try out the classes. It has two studios, one focused on strength and one on cardio.

The **H2 Club** in Victoria isn't technically new but the power meters on the bikes are. We went to the Stages Flight Class in December, where a mixture of profiles to music combined with video images was layered with data from the power meter in the left crank. I've downloaded the app ready for my next ride.

I was going to mention **Another Space** but as we start 2020, **Digme** are rebranding them, consistent with their message that the sector needs consolidation. In July, while the Tour de France riders were racing

into Paris, the 'Digme Tour' was finishing its three-week indoor cycling classes with a back-to-back-to-back class! Yes, three in a row at **Digme's** studio in Fitzrovia. I was thrilled to be invited to join such elite riders on that occasion.

There's a few still to try like **BuddhaBox** which opened in December, plus **Rumble** in Dalston, **1Rebel** and **Barrecore** in Angel, **Barry's Bootcamp** in Canary Wharf, **Core Collective** in St John's Wood and **Heartcore** in Soho.

Then there's **F45**, the fastest growing fitness franchise that just continues to add to its already impressive number of sites around the UK!

I did go to **SoulCycle** in Soho but haven't yet made it to the new studio in Notting

Hill. Talking of Notting Hill, there's the new **Psytle** site to check out too.

Let's not forget the new super-premium **CrossFit** in Putney and congratulations to **WIT Fitness** at St Pauls – funded for expansion in 2019. **Ten Health & Fitness**, winner of the Tatler Gym Award 2019, also received funding in 2019.

I'm sure we will see lots more active investment in 2020, so it looks like the team and I have another year of new experiences to come. Bring it On! ●



David Minton is founder of The Leisure Database Company (TDLC)

www.leisuredb.com

HCM

HANDBOOK 2020

RESEARCH ROUND-UP

On the button	p62
Smart money	p70
Universally fit	p78
Body and soul	p86
Fit together	p94
Science snapshots	p100



Functional fitness, personal training and small group training are showing growth

ON THE BUTTON

The 2019 *European Health & Fitness Market Report* by EuropeActive and Deloitte heralds a new period of growth for the European fitness sector

Five years ago, EuropeActive adopted its goal of the industry achieving 80 million members by 2025 – with about 46 million members reported at the time.

The sector is still on track to reach this target, as total membership within the European Union, Norway, Russia, Switzerland, Turkey and Ukraine increased by 3.5 per cent in 2018 to hit 62.2 million members at the end of that year.

As Karsten Hollasch, head of consumer business at Deloitte Germany and co-author of the report, says: “The European fitness club market continued its growth trend in 2018, but significant potential remains, as only 7.8 per cent of Europeans have a fitness club membership.

“With the development and roll out of innovative fitness concepts and the integration of new technologies, we expect membership to increase over the next years – towards EuropeActive’s goal of 80 million members by 2025.”

Depending on the development of the US market, which reported revenues of €26.6bn in 2017, according to the 2018 *IHRSA Global Report*, the European fitness market (€27.2bn) could again be the largest fitness market worldwide. At constant foreign exchange rates, the European market size rose by 3.4 per cent compared to 2017. At actual foreign exchange rates, year-on-year growth amounted to 1.2 per cent, driven by negative exchange rate effects from some countries.

While the low-cost segment continues to grow in most markets, there’s also an increasing number of boutiques and growth in offerings such as functional fitness, personal training and small group training. ▶



Strong campaigns, live classes and expanding its product offering and target audience drove RSG’s membership



Revenue at Virgin Active decreased 4.9 per cent

- Digitalisation and fitness intermediaries are increasingly shaping the fitness landscape.

HIGHEST RANKINGS

Among leading operators, German discount chain McFit Global Group – recently rebranded as RSG – retained its top position in terms of membership, with 1.95 million members across 288 clubs.

These operate under brands McFit (253 clubs), John Reed (20 clubs) and High5 (15 clubs). The company attributes the increase of 220,000 members over the previous year to strong campaigns, the introduction of live classes and expansion of its product offering and target audience.



We expect membership to increase towards EuropeActive's goal of 80 million members by 2025

Karsten Hollasch

Ranking second is Netherlands-based low-cost chain Basic-Fit (1.84 million members), which generated by far the highest organic membership growth of all operators, with 316,000 additional members. This was largely due to the opening of 92 new clubs in France.

British low-cost operator PureGym ranks third, after increasing its membership by 85,000 to 1.01 million in 2018, becoming the third European fitness operator to reach 1 million members.

After these three market leaders come UK-based The Gym Group in fourth, German operators Clever Fit in fifth and FitX in sixth place.



PureGym increased revenues by 12.8 per cent, solidifying their top 10 rankings with double-digit growth

Seven of the top 10 operators by membership can be considered low-cost operators. In addition, two others in the top 10 – SATS Group and Migros Group – have a low-cost brand in their portfolios, while five low-cost operators (McFit Group, Basic-Fit, PureGym, Fitness World and Clever Fit) also rank among the top 10 in terms of revenue.

UK-based premium operator, David Lloyd Leisure (DLL), again tops the ranking in Europe, with revenues of €545m – an increase of €62m over the previous year. DLL further expanded its international presence in 2018 through the acquisition of the City Green Sports and Health Club

in France near Lake Geneva, as well as the acquisition of Health City's Bad Homburg Club in Germany.

At year-end 2018, DLL operated 114 clubs in eight countries – including 99 clubs in the UK – with a total of 609,000 members, placing the company seventh in the European membership ranking.

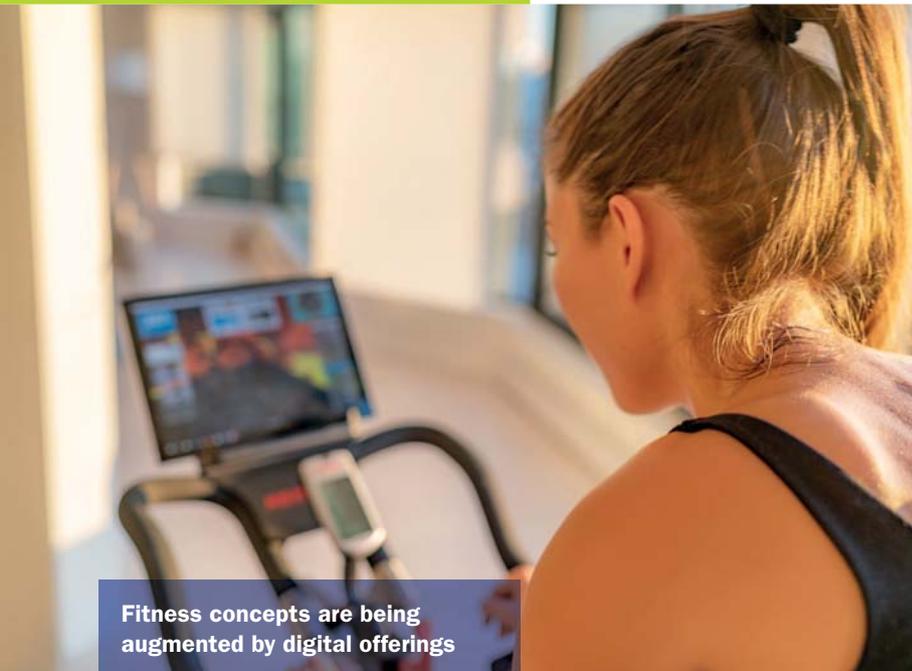
LOW-COST DRIVE HIGH

However, revenue growth was primarily driven by the low-cost businesses. Dutch operator Basic-Fit had the highest revenue growth, both in absolute terms with an increase of €76m and in relative terms, with 23.3 per cent growth and a move

MOST IMPROVED

Basic-Fit
highest revenue
growth in 2018 from
€76m to €402m

**23.3% rise from 6th to
2nd place in European
revenue ranking**



Fitness concepts are being augmented by digital offerings

► from sixth to second place in the European revenue ranking. Basic-Fit had total revenues of €402m.

McFit/RSG moved from fifth to fourth place in the ranking, following a 7.6 per cent increase in revenues, while fellow low-cost operators PureGym increased revenues by 12.8 per cent, Fitness World by 19.2 per cent and Clever Fit by 22.0 per cent, solidifying their top 10 rankings with double-digit growth.

By comparison, premium operators such as the Switzerland-based Migros Group, with minus 1.2 per cent, Nordic market leader SATS Group at plus 0.3 per cent, and UK-based companies Nuffield Health with plus 2.9 per cent and Virgin Active with minus 4.9 per cent, displayed only slight increases or even slight decreases in revenue. This was also affected by negative exchange rate effects in Switzerland, Sweden and the United Kingdom.

MERGE AND ACQUIRE

SATS Group, L'Appart Fitness, Keep Cool and SportCity/Fit For Free are just some fitness club operators involved in mergers and acquisitions in the European health and fitness market over the 2018 calendar year.

In fact, 24 major M&A deals were recorded in 2018, the highest number since the *European Health and Fitness Market Report* has been published and an increase of four transactions compared with 2017.

"The consistently high number of mergers and acquisitions underlines the notion that health and fitness remains a highly attractive sector for strategic and financial investors alike," says Hollasch.

"By supporting the innovation and expansion of fitness operators, these investors help the health and fitness industry to achieve further growth."



Regarding investor types, 18 of the 24 M&A transactions represented a sale to a strategic investor, i.e. another market participant. In addition to this, five businesses were sold to financial investors, indicating the interest of investors in the fitness industry, while one company was sold to a private investor.

The large number of transactions from founders to strategic investors indicates an increasing market consolidation. However, consolidation in the operator market remains low compared to the commercial fitness equipment market, where the four leading companies – Life Fitness,



Revenue at McFIT rose 7.6 per cent (above), while Nuffield Health had a 2.9 per cent boost (right)

Technogym, Johnson Health Tech and Precor – account for an estimated 75 per cent of the global and 86 per cent of the European commercial equipment market.

GERMANY TAKES TOP SPOT

With a membership growth of 4.5 per cent to 11.1 million members, Germany strengthened its position as the country with the highest membership, ahead of the UK (9.9 million), France (6.0 million), Italy (5.5 million) and Spain (5.3 million).

At the same time, Germany ranked first in terms of market size, with total revenues of €5.3bn, according to research conducted ▶



► by DSSV, DHfPG and Deloitte. However, this was partly due to negative exchange rate effects in the United Kingdom, as the UK market grew by 4.3 per cent at constant currency compared to a 2.5 per cent growth in Germany.

Together, the top five countries represent nearly two thirds of the entire European market in terms of memberships and revenues. With penetration rates of about 9-15 per cent, these countries generally offer further market growth potential and are expected to be major drivers towards the set goal of 80 million total members in Europe by 2025.

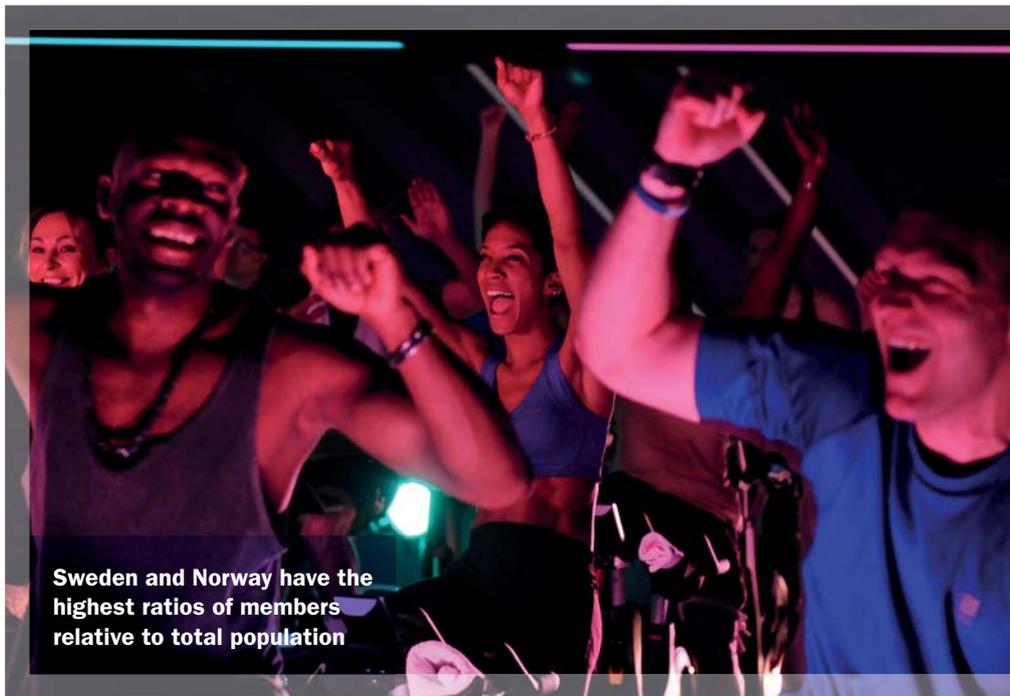
While Sweden (21.6 per cent) and Norway (21.4 per cent) have the highest ratios of fitness club members relative to the total population, Ukraine (2.9 per cent) and Turkey (2.6 per cent) have relatively low penetration rates, which could – in combination with their large populations – indicate potential for growth.

MACRO TRENDSETTING

“Further growth in the fitness market will be driven by favourable macro-trends, such as increasing health awareness, but more importantly by innovative fitness concepts and business models that meet customer needs,” explains Hollasch.

“The definition of the industry as a purely stationary fitness market is over: existing fitness concepts are being augmented by digital offerings and new market participants are developing entirely new purely digital concepts.”

Thus, technological innovations such as mobile fitness apps, wearables and online fitness as well as offline activities like outdoor group workouts, provide opportunities to be physically active outside



Sweden and Norway have the highest ratios of members relative to total population

NUMBER CRUNCHING

**EUROPE
TOTAL MEMBERS**
62.2m

NO 1 COUNTRY
Germany 11.1m members

**EUROPE TOTAL
REVENUES - €27.2bn**

NO 1 COUNTRY
**Germany €5.3bn
total revenues**

NO 1 COMPANY
McFit/RSG
1.95m members

NO 1 COMPANY
DLL
€545m revenue

**PERCENTAGE
OF EUROPEAN
POPULATION WITH
MEMBERSHIP**
7.8%



More small- and medium-sized facilities are opening closer to where people live and work, making fitness more accessible

a brick-and-mortar gym and continue to gain popularity in many European markets.

While these offerings might be considered a threat by some operators, many fitness providers also see opportunities and have started to incorporate these concepts into their business models.

With regard to EuropeActive's goal of 80 million members by 2025, Herman Rutgers, board member at EuropeActive and co-author of the report, remains optimistic, saying: "2018 was another year of growth. It was interesting to see positive developments across all market segments; value, premium as well as mid-market.

"Additionally, we saw more small- and medium-sized facilities opening closer to where people live and work, making fitness more accessible. We remain confident we'll reach the goal." •



Basic-Fit generated the highest organic membership growth of all operators



■ READ THE REPORT

Hardcopy: [HCMmag.com/deloitte2019/print](https://www.hcm-mag.com/deloitte2019/print)

Digital: [HCMmag.com/deloitte2019/digital](https://www.hcm-mag.com/deloitte2019/digital)



The domestic fitness sector is faced with the challenge of making constant advances in product and delivery

Smart MONEY

Can the UK's boutique health and fitness sector secure sufficient finance to spread its wings? Deloitte's Alicia Whistlecroft sizes up the stats

The domestic health and fitness industry has developed and evolved rapidly over the last 35 years into a relatively mature yet still attractive, growing market. According to The Leisure Database Company's 2019 *State of the UK Fitness Industry Report*, this market is valued at an estimated £5.1bn – a 4.2 per cent rise on 2018 – with a projected compound annual growth rate of around 8.5 per cent in value and 5 per cent in the number of gyms and health clubs over the next five years.

However, this is an industry faced with the challenge of making constant advances in product and delivery, as it's customers continually become more educated and aware of the benefits of different types of exercise on physical and mental health.

Over the last decade, the main disruption in the UK has been the strong growth of the budget operators, but more recently another storm has hit the industry – in the form of the boutique fitness operators.

The development of the boutique sector is potentially much more diverse in

its impact than the growth of the budget operators. It's also much more challenging from a funding perspective, with the need for specialisation and sustainable differentiation being more important than scale. So how can this sector attract the necessary funding to make a real impact on the structure of the industry?

ELEMENTS OF BOUTIQUE

There are three underlying elements that can be used to define a boutique business: a focus on a clearly defined (specialist)



Some players, like Barry's Bootcamp, are well on their way to achieving a strong international footprint

product; flexible and/or bespoke delivery of the product; and an underlying desire to create a community amongst its customers.

The focus is often on both a style of exercise and how it is delivered. Some sub-sectors are more developed (e.g. cycling), whereas some players are already well on their way to achieving a strong international footprint (e.g. Barry's Bootcamp).

People enjoy the flexibility of boutique classes without being tied to a gym membership. Furthermore, with memberships it's very easy to find an excuse to go tomorrow, whereas with a class-based product, you book a time and frequency to suit you. This means you're more likely to attend, leading to increased commitment and consistency of training.

Another significant differentiator of boutique fitness studios is that they are able to better offer a sense of community. Given the studios are small with a specific timetable of classes, the staff and customers become familiar with each other. This makes the exercise experience more enjoyable and customers are able to identify with the brand, which in itself is a ►



Xponential Fitness runs its boutique brands via independent franchises

- ▶ powerful growth tool. The creation of this community spirit further fuels customer's appetites to attend a workout class at their favourite boutique studio and in turn this helps to build customer retention.

DEMOGRAPHIC DRIVERS

It would appear that the millennial and generation Z demographics are the drivers behind this new type of exercise; young fitness enthusiasts who view health and fitness as a way of life.

They are willing to pay more for a class that is tailored to their specific goals, that is more fun and engaging compared to just a routine gym workout, and for sessions that

“ Millennials and Generation Z drive boutique exercise classes – young fitness enthusiasts who view health and fitness as a way of life

tend to specialise in one type of exercise with smaller class numbers.

Interestingly, a large portion of customers at boutique fitness classes are women. The *Global Boutique Trends Report 2018* found that women made up 83 per cent of classes booked in London. This gender divide is similar in both New York and Los Angeles where women made up 83 and 81 per cent of bookings respectively.

BRANDING ACROSS THE POND

The US boutique fitness sector already has some large players such as Barry's Bootcamp; a brand launched in LA in 1998 which has financial backing from North Castle Partners.

After 11 years of operating solely in LA, this brand is now developing into a global business with studios across the US and franchises in other major cities around



There are now many smaller UK boutiques with great concepts and rapidly growing customer bases

the world. It now has over 50 sites in nine countries; the latest one being in Australia.

Orangetheory has grown even quicker through franchising. Since starting out in 2010, it now has around 1,000 worldwide units in roughly 20 countries. Orangetheory has all the typical characteristics of a boutique – its differential niche is the use of heart rate monitors worn by each customer, with the objective of working in specific heart rate zones to ensure maximum calorie and fat burning based on scientific knowledge.

Throughout the workout, all participant's outputs (heart rate, calories burned etc) are displayed on a main screen in the

studio – this helps to drive motivation and competition, maximises output from customers and is another component of the community spirit. The idea of having a differentiated selling point is key for companies trying to gain traction and succeed in this highly competitive industry.

Xponential Fitness on the other hand is a group of boutique brands from across the major categories of boutique fitness (pilates, barre, cycling, rowing, yoga, stretch and dance). The brands are run via franchise models with studios in close proximity to each other, helping to drive the cross brand offering; however, they're run independently and don't share central services.

Xponential Fitness had much of its initial growth supported by financing from TPG Partners since CEO Anthony Geisler sold Club Pilates to TPG after growing it from 80 to 475 franchise territories. Geisler and his business partner Mark Grabowski (an ex-TPG partner) have since bought Xponential back from TPG Partners.

L Catterton, an established institutional investor with a focus on growing consumer brands, has been very active in the sector. Investments (both past and present) include Peloton, Flywheel, Pure Barre and CorePower Yoga. L Catterton also invests in health and beauty products such as Bliss and in related areas such as healthy food. ►

- ▶ All of these subsectors have positive market dynamics and there is some convergence as companies look to become more holistic in their overall approach.

The boutique fitness market has not quite reached IPO level yet; SoulCycle previously filed for an IPO but withdrew and Flywheel considered an IPO but has decided against it for now. However, this is something we could expect to see in the near future from some of the larger operators who have had significant success to date.

However, the US does already appear to be a little crowded in some geographies. For example, New York has numerous brands of fitness studios, e.g. the cycle studio space has the likes of SoulCycle, Flywheel, Peloton, Revolve, Crank, Swerve, Cyc, Syncstudio and so on.

By comparison, London, a city with a similar population size to New York, has a much smaller number of boutique fitness studios, with many operators only having a handful of studios, suggesting there remains significant opportunity in the UK, as well as Europe, where there aren't as many boutique fitness concepts established as yet and the roll out of existing brands has been on a smaller scale.

UK TO FOLLOW IN US FOOTSTEPS

Many expect the UK to follow in the footsteps of the US, as it has in other sectors, so we could expect to see increased levels of investment in the coming years.

There are a lot of smaller UK boutiques out there with great concepts and rapidly growing customer bases such as TRIB3, Core Collective, KoBox, Psycle, BLOK, Flying Fantastic etc, so there are plenty of



Our boutique sector may follow the US trend of rising levels of investment

opportunities for financial investors either on a single brand basis or through building a brand portfolio.

To date there have been a number of successful capital raises from a wide range of sources including:

Crowdfunding (Crowd Cube and Seedrs, for example) can be an excellent way of proving out an initial concept before approaching the institutional investors to create scale. Crowdfunding can also assist with marketing and establishing a loyal core of advocates for the brand.

Network funding (Wealth Club, Codex Capital, for example) from one of a number

of financial advisors with an established network of high net worth investors who are willing help companies present their ideas to this network to raise funds. This tends to be second or third round funding, where there is some proof of concept. **Family funds** are becoming more and more active and increasingly structured as high net worth families look into ways of more independently managing their money. Those who have made money in the health, wellbeing and fitness markets are usually more inclined to invest where they feel they have an edge.

Institutional funds (such as NVM and



There are plenty of opportunities for financial investors on a single brand basis or by building a brand portfolio

Piper) are expressing more interest and this will enable more scale businesses to be built. These institutions typically raise 10-year funds; the benefit of this being that the money is already raised and follow-on capital can be agreed at the board level (as achieved at Gymbox). Typically, these funds would look to invest in businesses with more than £1m EBITDA.

ACCESSING CAPITAL

In boutique sectors it can be harder to attract interest from institutions because of concerns over scale, competition and 'keyman' dependency. In approaching

“ Institutional investors like to invest in companies that have the potential to continue growing for 10+ years to recapitalise their business

institutional funds and family funds, businesses should focus on being able to answer the following common challenges from investors:

■ Over the medium term is it possible to create a scale business?

Institutional investors like to invest in companies that have the potential to

continue growing for 10+ years, as this makes it easier to recapitalise the business. For specialists this can be a challenge as the product may have a limited market. As well as creating an effective roll-out model, brands can consider merchandising, franchising, tie-ups with mass market brands etc to provide a range of growth levers. ▶

► **■ Does the model work outside London?**

The majority of UK expansion is likely to be within metropolitan areas, with a large portion of the UK's current boutique fitness studios being in and around London. Some have expanded outside the capital, including Barry's Bootcamp, which recently opened a site in Manchester, and F45 (a company offering 45-minute high-intensity, circuit training workout classes) which has several franchised locations around the UK, including Birmingham, Brighton, Chelmsford, Harrogate and Reading, with many more opening soon. So no doubt other companies contemplating national expansion will be keeping a close eye on how these studios perform compared to their London counterparts.

■ **Can the differentiation be sustained?**

Many industry experts believe there is an increasing pool of additional customers alongside the existing fitness industry as millennials place a greater importance on their fitness than previous generations. Appealing to these more 'intense' users of health and fitness should be expanding the market. However, with sometimes relatively low barriers to enter and also existing mainstream players who already have the footprint to exploit new concepts, the investors will need to be convinced the growth plan is sustainable.

■ **'Keyman' dependency**

Not a challenge for more tech-driven products but where the customer experience is largely governed by the people delivering the training, replicating this as a business grows can be challenging.



Boutiques are now expanding outwith London to other major cities

“ **This market will continue to prosper as individuals become more focused on their health and fitness and the different ways to train**

FUTURE GROWTH

One thing is for sure, as more competition comes along in the form of both new concepts as well as new sites for existing companies, the quality of the studios and the classes available will need to be the best in the market in order to succeed.

More mature consumer sectors have a long history of creating new boutique products and we expect the health and fitness sector to continue to throw up new and interesting alternatives to the mainstream. This is a market that has seen

rapid growth and will continue to prosper as individuals become more focused on their health and fitness and the different ways to train. If this is the case, it becomes a question of consumer preference, which training methods are most favourable and if there is the same level of appetite outside the major cities. These factors will help define which boutiques are successful and can grow significant market share.

There is a lot of growth still to come in this sector, from both new emerging concepts as well as existing concepts



Capital is now sourced from crowd, network, family and institutions

taking advantage of the ever increasing empty retail spaces on the high street and expanding into new studios across the country. Private Equity is well placed to support this growth and make the most of an industry that is set to continue to grow as health and fitness becomes a more integral part of consumers' lives.

Moreover, this growth isn't just in the fitness space, the increasing focus on 'wellness' is extending to nutrition, supplements, clothing and more. Investors have been active in this segment of the market, including Lion Capital's investment in the sports nutrition company Grenade, Piper's investment in Proper Snacks and Pembroke VCT's investment in Plenish Cleanse. Plus, there are plenty more nutrition or healthy snacking

based companies out there, such as Fulfil Nutrition, Eat Natural, Pip & Nut, Rude Health, Pure&Co and many more. Boutiques are well placed to benefit from partnerships with businesses from these other sectors, which are keen to build on the strong customer loyalties experienced in the boutique fitness market.

Additionally, there is a big opportunity for boutiques, as well as their financial investors, to work alongside health organisations, insurance companies etc, and provide evidence-based fitness programmes to their customers as part of a wider integrated health and wellness programme. By aligning themselves with these types of organisations, boutique brands will gain further exposure to different markets, such as healthcare, and by doing so will cement

themselves in the industry as a key player and one that is responsible and sustainable, whilst no doubt a partnership like this would have a significant impact on their growth trajectory.

Overall, the UK boutique fitness market is an exciting space to be with lots more opportunity and growth still to come. With many appealing investment characteristics we believe it is only a matter of time before private equity and other financial investors take a real plunge into this market. ●



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Universally FIT

Health and fitness club membership hit a global high note in 2018. IHRSA's Melissa Rodriguez sums up the key stats

Topping 183 million users around the globe, health club membership had its best year ever in 2018. Industry revenue totalled an estimated US\$94bn, and the club count exceeded 210,000 facilities. Leading markets also continued to show growth in the Americas and Europe.

THE AMERICAS

Across North America, including the US and Canada, the health club industry attracted 68.6 million members at more than 46,000 club sites in 2018. Revenue, membership numbers and the total number of clubs all increased compared to the previous year. Revenue grew from US\$30bn in 2017 to US\$32.3bn in 2018, while membership numbers rose from 60.9m to 62.5m.

The US club count increased from 38,477 to 39,570 facilities. The membership penetration rate in the US was 20.8 per cent in 2018, while Canada's was lower at 16.7 per cent. Roughly 6.1 million Canadians belonged to one of approximately 6,500 fitness facilities in the country.

The Latin American health club market is robust, with potential for growth. Based on data gathered in the *IHRSA Latin American Report* (second edition), Brazil's 34,000 health clubs rank the country second only to the US among global fitness markets in terms of numbers. More than nine million Brazilians belong to a health club.

With more than 12,000 facilities, Mexico ranks second in Latin America and third worldwide in terms of number of clubs. Opportunities for growth are abundant in Latin America, as member penetration rates remain low across 18 countries.





MIDDLE EAST & NORTH AFRICA

Based on findings gathered by The FACTS Academy, approximately 3.8 million members utilise 5,800 health clubs in 10 markets in the Middle East and North Africa. These 10 markets collectively generate roughly US\$2.3bn in industry revenue. Saudi Arabia leads all markets in this region in revenue, with approximately US\$940m generated at 1,250 health clubs, which attract more than 1.2 million members.

In terms of club count, Egypt leads all Middle East and North Africa (MENA) markets with 1,680 facilities.

Despite conflicts in several MENA countries disrupting day-to-day life, there is still a demand for fitness, with consumers seeking to exercise and reap the benefits of an active lifestyle.

Successful international fitness operators, including Fitness First, Gold's Gym and World's Gym, have expanded into the Middle East.

Fitness Time, based in Saudi Arabia, has more than 160 facilities in the Middle East, highlighting the opportunity in this region.

The outlook of the health club industry is bright and promising. As leading economies continue to improve, the industry is expected to thrive in the global marketplace, serving consumers with a variety of health and fitness needs. Offering access to fitness amenities, instructors, trainers and coaches, club operators are well-positioned to lead a healthier world.

EUROPE

Roughly 64.3 million Europeans belonged to a health club or studio in 2018, as the industry generated an estimated US\$32.1bn in revenue at 63,955 facilities.

The UK and Germany continue to lead all European markets. In the UK, according to research by the Leisure Database Company, 9.9 million members belong to one of the nation's 7,038 health clubs and studios. Germany attracts more than 11 million members at 9,343 locations and generates US\$6.3bn in annual revenue.

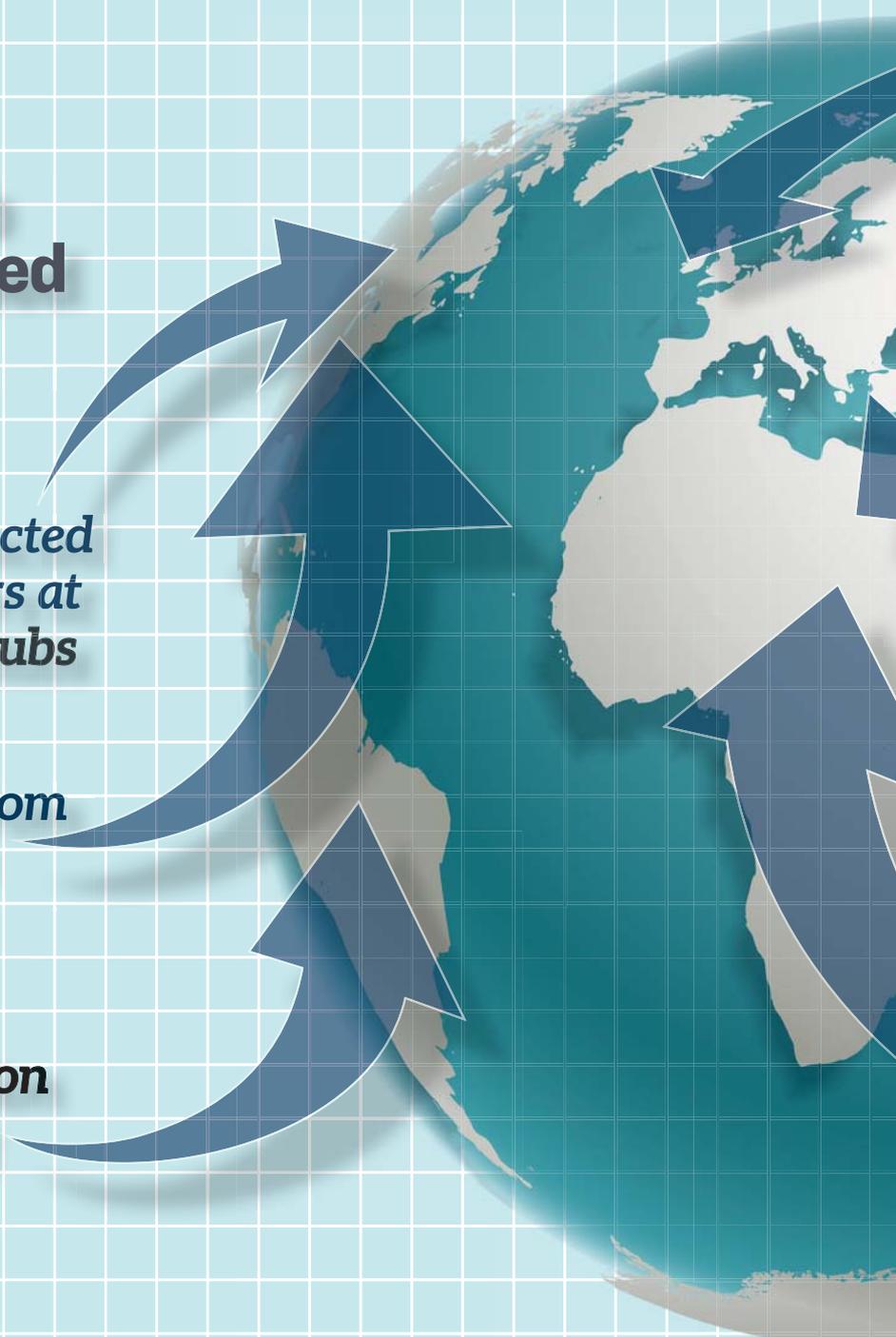
According to the 2019 *European Health & Fitness Market Report*, Europe has strong prospects for growth considering not only the mature, solid markets in Western Europe, but also the potential in Eastern European markets: while the overall penetration rate in Europe was 7.8 per cent in 2018, Turkey and the Ukraine had the lowest penetration rates at 2.6 per cent and 2.9 per cent, respectively. ►

▶ **Global health club membership topped 183 million users**

North America attracted 68.6 million members at more than 46,000 clubs

US club count rose from 38,477 to 39,570

More than nine million Brazilians belong to a health club





9.9 million members belong to one of the UK's 7,038 health clubs & studios

Global industry revenue totalled an estimated US\$94bn

Egypt leads all MENA markets with 1,680 facilities

Saudi Arabia US\$940m generated at 1,250 health clubs attracting more than 1.2 million members

Around 3.8 million members utilise 5,800 health clubs in 10 markets in MENA

Less than 3% of people in China belong to a health club

CHINA

The health club market in China is among the largest in the world. On Mainland China, the combined revenue from the top 10 cities ranks fourth among all global markets at US\$3.9bn in annual revenue, while the number of club members ranks ninth in the world at 4.5 million.

Opportunities for growth and development remain for the industry in China, as the market has one of the lowest penetration rates among developed countries. Only 2.98 per cent of people in Greater China belong to a health club.

Although the concept of modern fitness clubs first appeared in China over three decades ago, large-scaled marketisation only began after the year 2000.

Before then, the average Chinese consumer had neither strong awareness nor sufficient disposable income to take out

a fitness club membership and fitness clubs were mostly designed as small gyms used only by athletes.

Over the past 15 years, the fitness club market in China has become diversified, with large chains, small studios, and new business models such as O2O – or Online to Offline – co-existing dynamically to address consumers' various needs.

China's rapid development in the past three decades has brought tremendous improvement to living standards, but also undesirable health issues such as chronic

fatigue and sleep disorder. Meanwhile, the national government has been actively increasing public awareness of sports participation and personal fitness by promulgating the Outline of Nationwide Physical Fitness Program in 2016.

As a result, domestic awareness of fitness has been significantly improved, especially in the past five years, and the fitness culture has become a symbol of a modern lifestyle in China. Currently, the penetration rate of fitness clubs in China is estimated to be 2.98 per cent in the top 10 cities.

INDIA

Home to one of the global economic powers, the health club market in India is among the largest in Asia-Pacific. It ranks fifth in market size among this health club market, at US\$821m in annual revenue. The number of health club locations ranks third in region at 3,813 sites, while India's two million members rank fifth in observed markets.

The fitness club market in India is highly fragmented. Chained top-10 organised players comprise only 15-20 per cent of the overall market in terms of number of clubs. Independent players that are mostly low-end 'mom-and-pop' shops make up the rest of the market. Even with considerable growth over the past decade, the fitness club market in India is still

relatively immature compared to other countries in Asia-Pacific.

Opportunities remain for the health club industry in India, as the country still has the lowest member penetration rate in the Asia-Pacific region. Only 0.15 per cent of the Indian population between the ages of 15 and 64 currently belongs to a health club.

In efforts to grow the industry in India, the United Health & Fitness Forum (UHFF) was formed in 2016. Led by the top club operators in India, UHFF and its members organise events such as training workshops, boot camps, walkathons, and group exercise classes, along with other health and fitness initiatives. ●

**The fitness market
in India generates
US\$821m in
annual revenue**



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BODY & SOUL

Leonor Stanton analyses the Global Wellness Institute's latest data on the global physical activity market



The Institute estimates the Global Wellness Economy to be worth a whopping \$4.5 trillion

PHOTO: SHUTTERSTOCK/AYAKOVLEV



Around 35 per cent of the population participates in recreational physical activities

The Global Wellness Institute's (GWI) *Move to be Well: The Global Economy of Physical Activity* report measures the "size of the global physical activity market, its key segments, highlights emerging trends, business models, cross-country variations, and public/non-profit initiatives that can help bring physical activity to all."

The Institute estimates that the 'Global Wellness Economy' is worth US\$4.5 trillion. This comprises US\$828bn generated by the "Recreational Physical Activity" market – the focus of the "Move to be Well" study, published in October 2019.

Whilst this is a significant market, the study's authors – Katherine Johnston and Ophelia Yeung, Senior Research Fellows at

“

We expect global consumers' awareness of the benefits of exercise on their health to continue increasing

Ophelia Yeung, GWI



GWI – are keen to stress that this should not hide the relatively significant levels of inactivity in our society estimated at between "one-quarter to one-third of adults" by the World Health Organisation.

This study identifies that around "35% of the population participates in recreational physical activities", which includes fitness, sports & active recreation, and mindful movement, including yoga, tai chi, qigong, Pilates, barre, gyrotronic and Feldenkrais (Figure 1). The study excludes exercise undertaken as part of domestic chores, work or transport-related.

Whilst previous GWI studies have measured "fitness", this report has widened the scope to include all forms of recreational "physical activity". Ophelia Yeung supports this wider definition, saying: ►

► “there are just so many more ways to be active than purely working out in the gym”.

REGIONAL DIFFERENCES

The study breaks down the US\$828bn global physical activity economy by region. This shows that North America, Asia-Pacific and Europe are significantly larger than the three other global physical activity markets in terms of expenditure.

North America has a particularly large “enabling sector” (equipment & supplies, apparel & footwear and technology) at US\$171.2bn compared with the next largest in Asia-Pacific at US\$125.5bn (Figure 2).

The average expenditure globally per participant averages at US\$306, of which US\$136 is spent on activities and US\$172 on equipment and services. There is however a huge variation in the average spent per participant globally (Figure 3).

North America has the highest participation levels (51 per cent) and, significantly, the highest expenditure overall per participant (including equipment) at US\$1,345. There is an interesting similarity in the average expenditure per participant in three regions: Middle East/North Africa (US\$181), Asia-Pacific and Latin America/Caribbean both at US\$176 on average per participant. Whilst Sub-Saharan Africa has the lowest expenditure per participant (US\$45), its participation levels (31 per cent) are nevertheless only just below the global average (33 per cent).

Indeed, “a large portion of the global population, especially in less wealthy countries, participates in recreational physical activities without spending much money.” Recreational football is an example of a low-cost activity and indeed much of the growth in the mindful movement

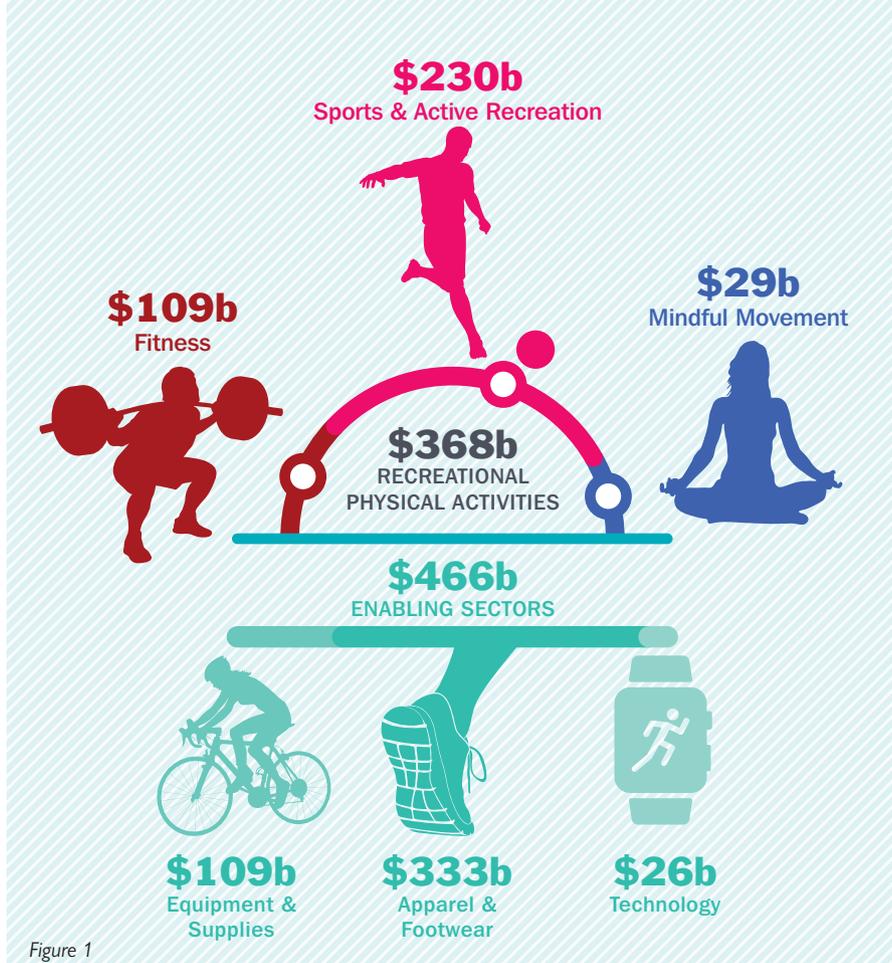


Figure 1

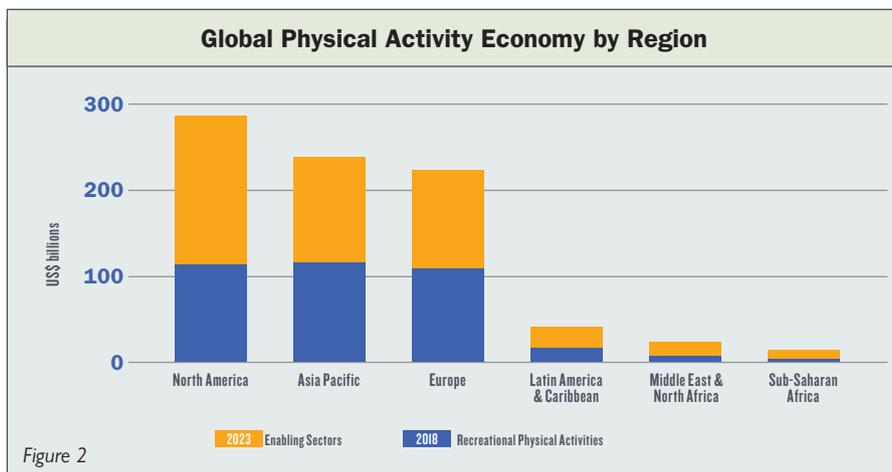


Figure 2



Much of the growth in the mindful movement is being practised online at home, expanding accessibility

sector, of which yoga is the most popular, is increasingly being practised “online, at home, and [via] low-cost methods of practising” thus “expanding access and lowering cost barriers to participation”.

According to Ophelia Yeung, “Our projections for growth outperform the overall economy growth forecasts as we expect global consumers’ awareness of the benefits of exercise on their health to continue increasing”. The study provides five-year future growth projections to 2023 in terms of market value.

Asia-Pacific and Sub-Saharan Africa are the regions forecast to grow most at 9.2 per cent and 8.2 per cent, respectively, albeit in Africa from a low base. Growth in the more mature markets of North America and Europe is nonetheless expected to be at just over 5 per cent annually between 2018 and 2023 (Figure 4).

In terms of sector growth, the two smallest sectors – mindful movement, currently worth US\$29.1bn, and technology, worth US\$26.3bn – are forecast to grow between 2018 and 2023 at 12.4 per cent

and 8.6 per cent, respectively. All other sectors are projected to grow annually at between 5 per cent and 7 per cent (Figure 5).

The study concludes that “the irony in these projections is that ever-increasing consumer spending on physical activity is not necessarily the solution to the global crisis of physical inactivity. From a public health perspective, the aim is simply to get more people more active, more often regardless of whether they spend more money while doing so.”

- ▶ Fortunately, the projections in most countries reflect not only higher levels of expenditure amongst those already participating in sports, but also higher participation levels, albeit at varying rates. The authors believe that “investment in public infrastructure, parks, outdoor gyms, school programs, physical education etc is critically important” in order to increase participation levels overall.

NO TIME OUT

A Global Wellness Institute review of over 75 studies in 60 different countries reveals that the top barrier to physical activity in both adults and the young is “lack of time”.

According to Katherine Johnston, “careful consideration of the barriers to exercise is critical in order to identify



Data can be useful to determine where there may be monetising opportunities or where further participation can be encouraged

Katherine Johnston, GWI



PHOTO: SHUTTERSTOCK/ 4 PM PRODUCTION

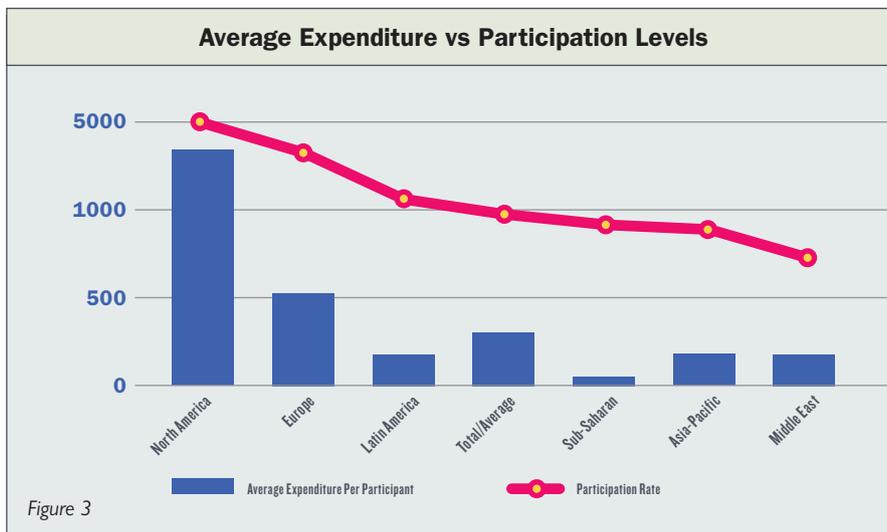


Figure 3

opportunities and also to encourage further participation". The report suggests a variety of ways to overcome these barriers:

Flexibility

This can be provided to counter lack of time and convenient facilities by offering apps and digital services where exercise can be undertaken in any location (e.g. at home, in hotels or rural areas) in a variety of languages via videos, mobile apps, "exergaming" (fitness video games) via live-streamed or pre-recorded classes with variations in level, intensity and length.

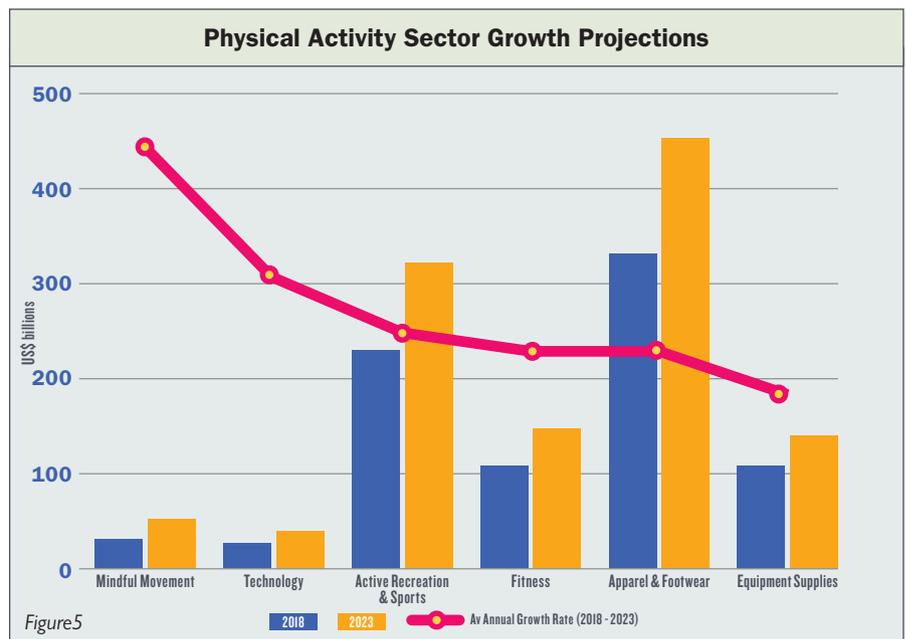
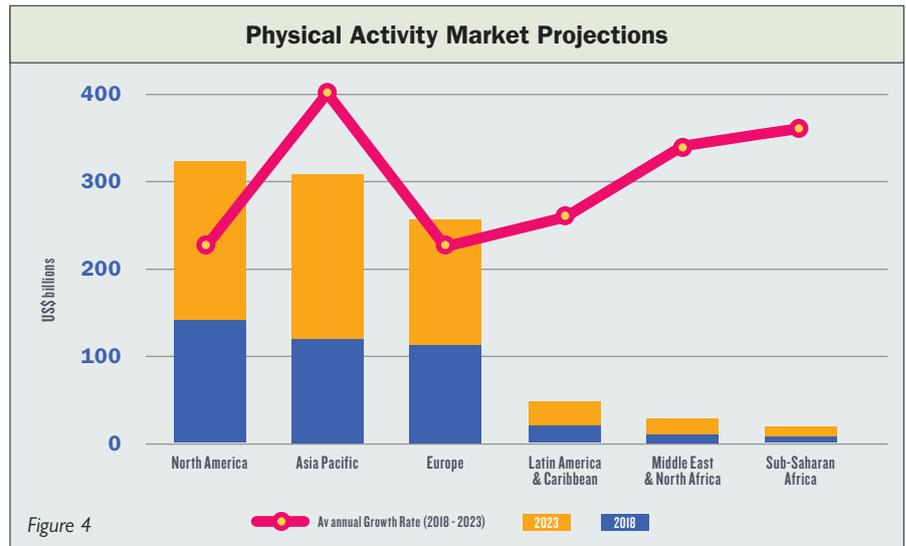
Fun

Adding 'fun' to exercising. Examples range from off-the-beaten track walks in London led by trained fitness guides combining tourism with exercise to bikes, skates and Nordic walking poles at Zurich airport.

Adding interest to exercise has been done by combining exercise with music, e.g. in Zumba classes, dance as exercise, working out as part of a community with inspiring teachers or social networks, e.g. in churches (also to address increasing loneliness), and by leveraging technology which incorporates competition, games, rewards, performance reviews and leaderboards. Dancing (plaza dancing in China to social dancing in Latin America), enjoyed by millions, is great exercise, fun and involves no spending.

Cultural changes

Adding movement to our increasingly sedentary lifestyles by incorporating movement into daily life either via workplace programmes, incentives and subsidies, treadmill and stationary bike





Communal events, like street zumba, encourage movement and socialising

PHOTO: SHUTTERSTOCK/VERVERIDIS VASILIS

- ▶ desks or providing paid time during the working day to work-out.

Co-locating senior and children's playground facilities, thus enabling parents and grandparents to exercise as they look after children is another example.

Urbanisation has led to more sedentary lifestyles but the report identifies a “burgeoning wellness real estate movement around the world [which] is helping to embed physical activity in the built environment in many different ways”, such as attractive staircases, miles of trails, walkways, dedicated bike/jogging lanes, sponsored programming, activities and

events that encourage movement and socialising and being part of a community.

Health and fitness clubs are also opening up as part of new residential developments, sometimes for the exclusive use of residents.

School

The daily habit should begin at school, currently lacking to varying degrees in many countries, thus the report concludes “an expanded focus on PE in schools for all children, across all regions, may be one of the highest-impact ways to increase physical activity participation over the long-term”.

Emphasis should also be on building a culture of movement throughout the school day, not only during PE lessons. Examples include “developing active and play-based lessons, scheduling movement breaks, and incorporating activity-based equipment and active seating into the classroom, such as pedal desks or short activity breaks throughout the day; the latter may not require specific equipment or investment.

Safe environments

The importance of exercise for women and girls, those with limited mobility or chronic conditions and baby boomers



Focusing on PE in schools could have the highest impact long-term

(“silver fitness”) is increasingly being recognised. Providing environments that are not only safe but also feel comfortable will encourage participation. Prescribing exercise “gives patients a powerful nudge” and there are schemes in a few places where this is working (e.g. the Exercise is Medicine ‘EIM initiative).

Affordable + accessible

Widening affordable accessibility is being addressed to a degree by HVLP (“high-value, low-price”) gyms. Small businesses in different communities also play a role in offering affordable facilities.

Governments have a major role in increasing affordable accessibility “as a way to keep their populations healthy and to prevent disease” with investment in “public infrastructure, parks, green spaces, running and biking paths, recreational facilities and programs”, and public low-cost health clubs.

EVERYONE ON BOARD

The report provides country by country statistics and Katherine Johnston believes that this “data can be useful to both the private and public sectors to determine where there may be monetising opportunities or where further

participation can be encouraged. The information is in the detail.

“Governments, nonprofits, private enterprises and entrepreneurs all have a major role to play” in order to reduce sedentary behaviour and expand physical recreational opportunities to all... both public and private efforts are essential”. ●



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In the UK, almost five million people take part in group exercise every week and this number is growing rapidly



We are calling on the public, local authorities, health club operators, the workforce and the industry to recognise the value of group exercise

Fit TOGETHER

EMD UK's Marcus Kingwell talks about the value and far-reaching impact of group exercise classes. It's time to invest to get the best!

As the national governing body for group exercise, EMD UK are committed to growing participation in the activity. Currently 4.86 million people take part every week and this number is growing rapidly with over one million more weekly participants since 2016.

With the upward trend in group exercise set to continue, the need for a qualified, highly skilled workforce is paramount for the safety of participants and sector growth.

In 2019, EMD UK worked in partnership with Active IQ to revamp the Exercise to Music qualification for the 21st century. The qualification, which had remained widely untouched since the 1990s, has been updated to reflect the changing fitness landscape and is now delivered under the name Level 2 Group Training to Music.

The national governing body also works with operators and boutiques, recently Third Space London, to upskill staff and review timetables, ensuring

PHOTO: SHUTTERSTOCK/RAWPIXEL.COM

“ 29% of current group exercise participants were inactive before starting in classes and 55% of those had been inactive for three years or longer

- ▶ the best possible group exercise experience is being delivered to members and that the workforce is happy.

Sweating Your Assets

In 2019, EMD UK published their white paper at the Elevate conference. Entitled *Sweating Your Assets: The Value of Group Exercise*, the report highlights the growth of this popular activity and demonstrates how it's moved inactive people into a regular physical activity habit.

It showcases the contribution that group exercise has made in creating a healthier nation through exercise but also notes that the activity is widely undervalued as a gateway to active lives, not just by the public but also by the fitness industry.

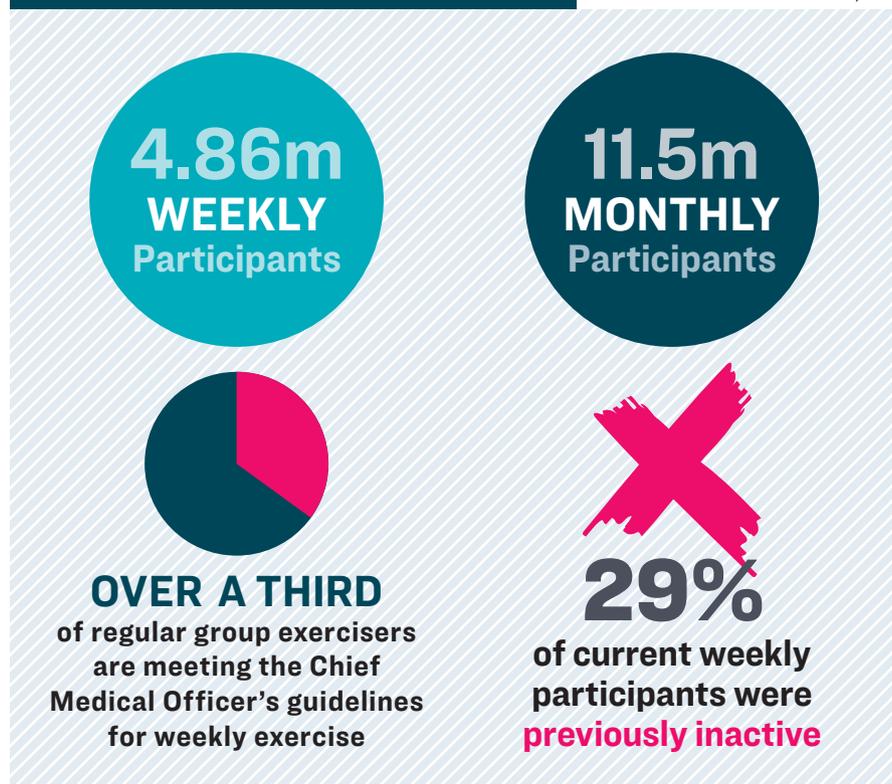
Group Together

Group exercise, or group fitness classes as they are also known, are a familiar sight in gyms, leisure centres, studios, and village and community halls.

With a range of classes to choose from, such as Pilates, dance fitness and boot camps, group exercise provides an accessible activity for those looking to start a regular exercise routine; one reason why

THE VALUE OF GROUP EXERCISE

EMD UK National Survey 2018



it has featured heavily in Sport England's This Girl Can campaign.

A large problem currently facing the UK is that of inactivity. The Chief Medical Officer's physical activity guidelines state that adults should participate in 150 minutes of moderate intensity exercise every week. To be classed as inactive, a person is doing 30 minutes or less activity every week.

In 2017, a study by the British Heart Foundation found that more than

20 million people in the UK were found to be physically inactive.

With inactivity thought to be more deadly than smoking, much more needs to be done to get people healthier. Group exercise has been proven as a gateway to physical activity. In fact, 29 per cent of current group exercise participants were inactive before they started to participate in group activity classes and 55 per cent of those had been inactive for three years or longer.



With a range of classes to choose from, group exercise provides an accessible activity for those looking to start a regular exercise routine

Group exercise offers fantastic social inclusion opportunities, health benefits and psychological support



IMPROVE WELLBEING

Exercising in a group can lower stress levels by 26%

Journal of the American Osteopathic Association 2017

► **Combat Loneliness**

Aside from the physical health benefits, group exercise promotes a wealth of mental and social benefits. There's been widespread coverage about the UK's current loneliness epidemic and it's not just the elderly who are prone to feelings of isolation or being alone.

Figures published in April 2018 from the Office of National Statistics (ONS) revealed that more than five per cent of adults in England felt lonely "often" or "always" between 2016 and 2017 (that's one in every 20 adults), with 16 per cent enduring feelings of loneliness sometimes, and 24 per cent occasionally.

Group exercise classes are more than just loud music, fast movements, and shouts of encouragement from an instructor at the front of a class. They also offer fantastic social inclusion opportunities, health benefits and psychological support – all imperative to combat loneliness.

The group setting really helps people develop a sense of community, truly feeling they are a part of something by being surrounded by like-minded, encouraging people, many of whom will have similar ambitions and reasons for joining.

PHOTO: SHUTTERSTOCK/RAWRPIXEL.COM



Members who attend group exercise classes are **26% less likely to cancel their gym membership**

The Retention People 2013



HEALTH IMPACT

Group exercise can **lower body fat** percentage by 1% in **women with type 2 diabetes**

American Journal of Health Behaviour 2015



Group exercise is **more profitable** per square metre **than cardio or weights areas**

Les Mills Insights 2019 Group Fit: raise revenue, reward instructors

Promote Group Exercise

Despite the merits of group exercise and the growing number of people participating, EMD UK argue that more needs to be done to promote the value of group exercise to wider society, and that health club operators have a key role to play.

Group exercise is often an afterthought in leisure centre membership promotions, where the marketing line “free classes included” frequently and instantly undervalues the activity. Many leisure and fitness operators are under pressure to reduce costs and offer cheaper services. Cuts to local authority budgets, the rise of the budget gym chains and growing competition for leisure spend mean the fitness marketplace is as competitive as it’s ever been.

However, group exercise can strengthen a gym’s membership retention. A 2013 study by The Retention People found that people who attend group exercise classes are 26 per cent less likely to cancel their gym membership. For this reason, and others outlined in *Sweating Your Assets*, health club operators and leisure providers must do more to promote the value of group exercise to their local communities

to create healthier, more active people. With the advent of social prescribing becoming more prevalent to lessen the burden on the NHS, leisure facilities can welcome more new customers. As an alternative solution for medical rehabilitation, these new participants have a genuine interest in attending the exercise classes on a regular basis.

Value Your Instructors

Investment in group exercise and its workforce is key to promoting positive activity changes in society. EMD UK have identified that the group exercise workforce is also endemically undervalued.

Instructors are the second biggest influencer on group exercise attendance and the face of the activity. Despite their work in helping people to get active, many instructors have not had a pay rise in over ten years. Investing in instructor pay, CPD and understanding the value group exercise brings to their business are ways that health club operators can raise the profile of group exercise for the good of the nation.

As an activity, the benefits of group exercise are far reaching. It’s not just the individual participants who profit from

better physical health, but wider society; increased mental welfare, lower stress, the opportunity to meet new people, fewer sick days, a reason to leave the house – all culminate in a healthier, more active society which is less dependent on social care.

As the national governing body for group exercise, we are calling on the public, local authorities, health club operators, the workforce and the industry to recognise the value of group exercise.

With one million more people participating since 2016, many more inactive people will convert to a regular physical activity habit. With a whole-system approach, we can achieve a healthier nation through exercise and *Sweating Your Assets* marks the start of this challenge for EMD UK. ●



Marcus Kingwell is CEO of EMD UK – the national governing body for group exercise.

www.emduk.org

Sweating Your Assets is available to download: <https://emduk.org/resources/instructor-resources>

Science SNAPSHOTS

We round up some of the latest research in the area of health, fitness and wellbeing

Exercising the body works out the brain

BRAIN BOOST

Physical fitness has been associated with better brain structure and brain functioning in adults.

The findings of a study, led by Dr Jonathan Repple of the University Hospital Muenster in Germany, suggests that increasing fitness levels through exercise could result in improved cognitive ability, such as memory and problem solving, and improved structural changes in the brain.

A group of researchers led by Repple used a publicly available database of 1,200 MRI brain scans from the Human Connectome Project and combined it with physical testing to assess the subjects'

physical fitness. Each subject's cognitive ability was also measured. The researchers excluded subjects with pre-existing conditions, such as neurodevelopmental disorders, diabetes or high blood pressure.

The results of the study showed that physical endurance was positively associated with the global cognition scores of the subjects taking part.

In its conclusion, the group of researchers said the results of the study suggests that physical exercise could be used as a form of preventative healthcare.

The study reads: "The observed pattern of results appears to support the notion of a beneficial effect of physical fitness on cognitive function. This notion is supported by the few available experimental studies

indicating that physical exercise leads to increases in memory performance and brain structural integrity.

"This concept might be of relevance for a wide range of domains in health and life sciences including prevention, clinical care and neurobiological research. Along with previous findings, our findings point to the potential of physical fitness as a modifiable factor that might be applied as an intervention in prevention and clinical care."

The report was simultaneously published in *Scientific Reports* and presented at the ECNP Congress in Copenhagen, Denmark.

Opel N et al. White matter microstructure mediates the association between physical fitness and cognition in healthy, young adults. Sci Rep (9/2019)



Strength muscle growth occurs at the expense of endurance muscle fibres

STRENGTH TRAINING

Research could explain the perceived decrease in endurance musculature as a result of strength training, providing new insights into age-related muscle atrophy.

Researchers at the University of Basel's Biozentrum in Switzerland set out to investigate what exactly happens in the muscle during training – specifically when it comes to the neurotransmitter brain-derived neurotrophic factor (BDNF) and its effects.

The team, led by professor Christoph Handschin, studied the BDNF, which plays an important role in the formation of muscle fibres. Handschin's team

demonstrated that BDNF is produced by the muscle itself and is capable of remodelling the neuromuscular synapses; the neuronal junctions between the motor neurons and muscle.

The conclusion is that BDNF not only causes “strength muscles” to develop, but at the same time leads to the number of “endurance muscle” fibres to decline.

“It is interesting that BDNF is produced by the muscle itself and not only exerts an influence on the muscle. At the same time, it affects the neuromuscular synapses, which are the junctions between the motor neurons and muscle,” Handschin said.

“However, strength muscle growth occurs at the expense of the endurance fibres. More precisely, through the release

of BDNF, the endurance muscles are transformed into strength muscles.

“This makes BDNF a factor proven to be produced by the muscle itself and to influence the type of muscle fibres formed.”

A follow-up study showed that in muscle lacking BDNF, the age-related decline in muscle mass and function is reduced. This new knowledge will, according to Handschin, provide a possible explanation for the decrease in endurance musculature resulting from strength training. The correlation is being taken into account in training plans for high-performance sports.

Delezie J et al. BDNF is a mediator of glycolytic fiber-type specification in mouse skeletal muscle. PNAS (6/2019)

► FITNESS PAYS

More than two thirds (68 per cent) of Americans would devote at least an hour each day to fitness activities if they received a financial incentive – even if this inducement was only US\$2 per day.

The 2019 UnitedHealthcare Wellness Checkup Survey also revealed that nearly 60 per cent of people in the United States would be more likely to participate in fitness sessions that offered an opportunity to socialise or make friends.

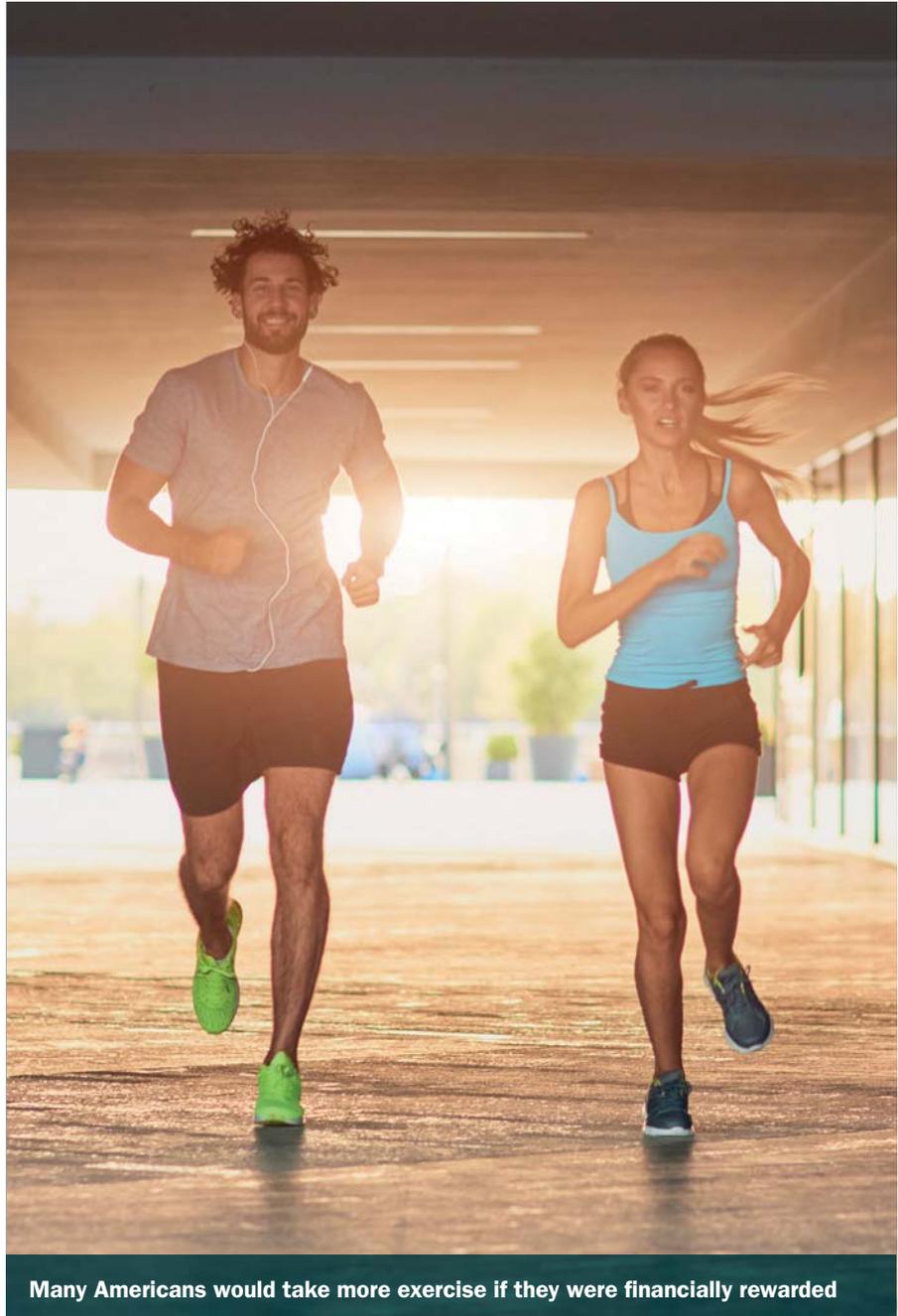
The nationwide study examined people's opinions about health topics and preferences, with the aim of offering insights to help improve employer-sponsored wellbeing programmes.

Worryingly, the survey showed that most of those studied underestimate the connection between lifestyle choices and chronic conditions.

Only a fifth (22 per cent) of survey respondents recognised that 80 per cent or more of the incidence of premature chronic conditions – such as heart disease, stroke and diabetes – are generally caused by modifiable lifestyle choices, such as smoking or unhealthy diets.

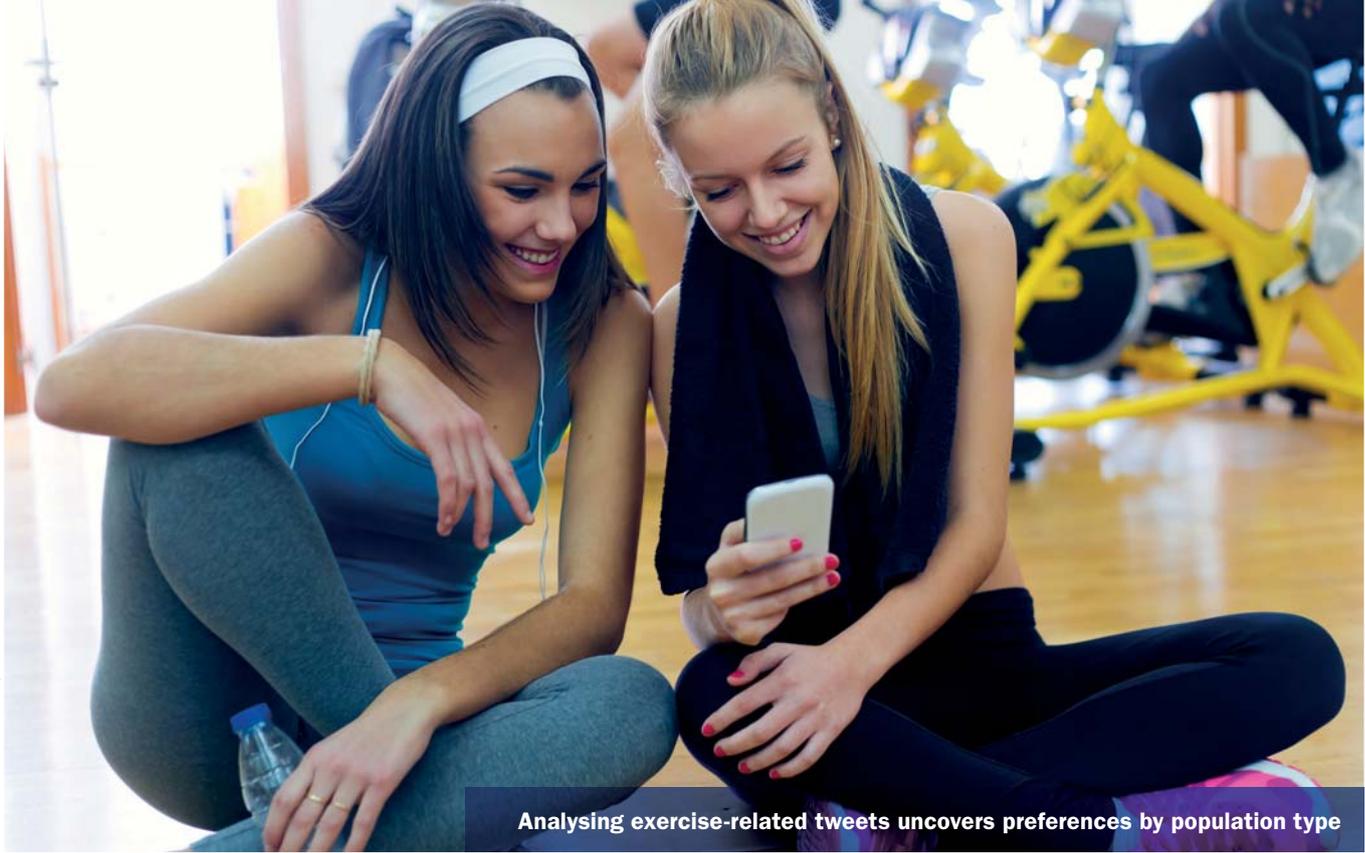
More than half (53 per cent) of the survey's respondents also anticipate being able to accomplish everyday activities until 80 or older, including 11 per cent saying those tasks will "never" be an issue.

Compiled by health care specialist UnitedHealthcare, the UnitedHealthcare Wellness Checkup Survey was based on a sample of 1,000 US adults aged 18 and older. The study results were published in May 2019



Many Americans would take more exercise if they were financially rewarded

PHOTO: SHUTTERSTOCK/ASTROSTAR



Analysing exercise-related tweets uncovers preferences by population type

EXERCISE TWEETS

Boston University School of Public Health (BUSPH) has combined social media posts and machine learning to chart the exercise habits of entire populations.

BUSPH researchers combed through exercise-related tweets from across the US and analysed the language of the tweets to uncover how different populations feel about different kinds of exercise.

The researchers used a set of AI models to find and analyse more than 1.38 million relevant tweets by 481,146 individual Twitter users in 2,900 US counties.

By doing so, researchers were able to unpack regional and gender differences in exercise types and intensity levels.

According to Dr Elaine Nsoesie, assistant professor of global health at BUSPH. The research unearthed insight that could be used to help make populations more active.

“By understanding differences in how people are exercising across different communities, we can design interventions that target the specific needs of those communities,” Nsoesie said.

“The study showed that, in most cases, lower-income communities tend to lack access to resources that encourage a healthy lifestyle.”

Dr Nina Cesare, study senior author and postdoctoral associate in global health at BUSPH, added: “In the future, social media and other digital data could help create interventions and policies informed not just by the habits of these communities, but also by

what they think of different physical activities.

“We believe this work provides a step in the right direction.”

The top exercise terms were walking, dance, golf, workout, run, pool, hike, yoga and swim. Walking was the most popular activity overall, but other activities varied by gender and region.

Findings included that women in the West of US did more intensive exercise than in any other region, while the Midwest had the most intensive exercise among men. Men did slightly more intensive exercise than women overall, and the South had the biggest gender gap in exercise intensity.

Cesare N et al. Social media captures demographic and regional physical activity. BMJ Open Sport & Exercise Medicine (5/2019)

► HIIT INJURY

A study on exercise injuries suggests that people who engage in HIIT could be putting themselves at greater risk of injury.

Research by Rutgers University in the US shows that there has been a steady increase in the number of injuries accredited to the use of exercise equipment since 2007. Using an analysis of people's exercise habits, the study then linked this increase with the growing popularity of HIIT.

A team of researchers at Rutgers analysed records in the National Electronic Injury Surveillance System from 2007 to 2016. They found 3,988,902 injuries resulting from the use of specific exercise equipment – barbells, kettle bells and boxes – and people doing callisthenics (burpees, push-ups and lunges). Both methods of exercise are common in HIIT.

The researchers found a steady increase (an average of 50,944 injuries per year) in gym injuries, which the team deemed to be in line with analytics showing the growth in the number of people doing HIIT workouts.

In terms of the types of injuries, the study found a significant increase in nerve damage, internal organ injuries, concussions, puncture wounds, dislocations, sprains and strains for the time period. Most involved knees, ankles and shoulders. The “most injured group” was white males aged 20-39.

In conclusion, the report states: “Given increases in injuries related to HIIT workout programmes, athletes should be educated on how to minimise preventable injuries. With particularly high rates of knee and ankle sprains and strains, neuromuscular training and pre-strengthening programmes,



More instruction is required to prevent HIIT-related injuries

which have been previously demonstrated to be effective among young athletes, may be particularly worthwhile in prospective participants.

“Physicians must be up to date with current fitness trends to best advise patients appropriately.”

Joseph Ippolito, a physician in the department of orthopaedics at Rutgers New Jersey Medical School – and a member of the research team, added: “These workouts are marketed as ‘one size fits all’, but many, especially amateurs, do not have the flexibility, mobility, core strength and muscles to perform these exercises.”

The researchers, however, stressed that the results shouldn't be seen as a reason for not taking part in HIIT – but should

encourage people to seek proper guidance and instruction ahead of their workouts.

“We certainly do not want to discourage people from this type of exercise because of its numerous health benefits, but recommend that they understand the pre-existing conditions and physical weaknesses that may predispose them to injury,” said co-author Nicole Rynecki.

“Exercises such as stretches that can increase range of motion and strengthen rotator cuff muscles are important, especially for older people.”

Rynecki ND et al. Injuries sustained during high intensity interval training: are modern fitness trends contributing to increased injury rates? J Sports Med Phys Fitness (6/2019)



Structured exercise programmes support living with and beyond cancer

CANCER CARE

Northumbria University (NU) has set out to uncover in detail the important role that structured exercise programmes can play in living with and beyond cancer.

Led by Professor John Saxton, head of the Department of Sport, Exercise & Rehabilitation at NU, the survey will combine a number of research projects – undertaken in collaboration with NHS Foundation Trusts in the North East, Norwich and Sheffield.

One of the studies will focus on the role exercise plays in reversing adverse body composition changes – such as increased

fat mass and reduced lean body mass – for patients recovering from hormone-receptor positive breast cancer.

Another, large-scale multi-centre trial, is investigating how exercise programmes prior to surgery can be used to improve fitness and treatment outcomes in colorectal cancer patients across the UK.

Elsewhere, a study will be used to develop effective exercise programmes designed to alleviate the side-effects of prostate cancer and its treatments.

“Physical activity and structured exercise have an important role to play in alleviating the physiological and psychological impact of cancer and its treatments. Cancer is now considered a chronic condition because

more people are living longer after a cancer diagnosis,” said Prof. Saxton.

“We know that common cancers, such as cancers of the breast, prostate and colon, can be linked to excess body weight and if patients put weight on after treatment, this can be linked to poorer outcomes.

“There is a real need to provide sustainable lifestyle support, including regular exercise, healthy eating and maintenance of a healthy body weight.

The NU research will be closely aligned with NHS treatment plans and has been designed to help build a solid evidence base to support the use of exercise in the holistic management of people living with and beyond cancer.

HCM

HANDBOOK 2020

WHO'S WHO

UK operators	p106
European operators	p136
Independent operators – project profiles	p150

HCM

HANDBOOK 2020

WHO'S WHO UK operators

We profile the UK's leading health club operations, from number of locations to plans for 2020

1Life

**LDH House, St Ives Business Park, Parsons Green,
St Ives, Cambridgeshire, PE27 4AA**

Tel +44 (0)1480 484 250

Email businessdevelopmentgroup@1Life.co.uk

Web www.1life.co.uk

Twitter /1LifeUK

Facebook /1LifeUK

Company profile

1Life is a forward-thinking lifestyle and leisure management solutions company. Across the UK, 1Life engages with communities and inspires people to enhance their lives through health and wellbeing, sports and physical activity. Our approach is collaborative, innovative, and focused on creating tailored solutions to help local authority clients achieve results at a local level.

Number of sites

23.

Plans for 2020

To continue investing in our contracts and new internal infrastructure and system upgrades.

MD: Mark Braithwaite



Professional background

Mark began his career with Cannons, progressing to Nuffield Health and Fusion Lifestyle before joining 1Life in 2014.

Previously regional director, he worked with 1Life's council partners, supporting the business development team in the South, before taking over as MD in January 2018.

Best piece of advice you've ever been given

If you don't have the right people in the right place, you'll never be able to fulfil your plans.

People might be surprised to know that...

I played table tennis against Boris Johnson and beat him!

3d Leisure

Peel House, Upper South View, Farnham, Surrey, GU9 7JN

Tel +44 (0)1252 732 220

Email info@3dleisure.com

Web www.3dleisure.com

Company profile

Owned by Mark Bremner, Andrew Deere, Paul Ramsay and Paul Dickinson, 3d Leisure is a facility management company operating in the hotel, corporate, education and private sectors. It offers a complete management solution for owners and operators, as well as support in key areas such as marketing and sales. The services provided are tailor-made to meet clients' specific objectives.

Number of sites

110 sites across the UK and Ireland; 6 in Greece.

Plans for 2020

Mobilisation of a number of new sites, plus to continue our growth in the corporate and hospitality sectors.

Managing director: Paul Ramsay



Professional background

I started as a fitness instructor with 3d 23 years ago. I was Operations Director for 17 years before taking on my current role in 2019. We have a team of 2 Operations Directors and 6 Regional Managers who work together to drive performance within our clubs and support our clients.

Best piece of advice you've ever been given

Surround yourself with people who are better than you!

People might be surprised to know that...

As an instructor I once left a pool on backwash overnight and completely emptied it!

Active Nation

**Unit 1B, Hatton Rock Business Centre, Stratford-upon-Avon
Warwickshire, CV37 0NQ**

Tel +44 (0)845 658 8360

Email stuart.martin@activenation.org.uk

Web www.activenation.org.uk

Company profile

Active Nation is a registered charity campaigning to persuade the nation to be active. It works in partnership with local authorities, managing facilities and promoting sport and exercise to communities as the principal means of increasing activity participation and reducing the incidence of major chronic diseases.

Number of sites

21 venues.

Plans for 2020

To continue strengthening our Supporter experience with digital behaviour through our website and app, which drives physical behaviour in our venues.

MD: Stuart Martin



Professional background

I started out as a fitness instructor in the early 1990s. My adventure through the industry has been via the experience of different roles within varied organisations and in the settings of different countries around the world.

Best piece of advice you've ever been given

Change nothing, nothing changes.

People might be surprised to know that...

I once held a Guinness World Record!
I bet you can't guess what for?!

Anytime Fitness UK

**Unit 14, Building 6, Croxley Business Park,
Hatters Lane, Watford, WD18 8YF**

Tel +44 (0)330 3322 361

Web www.anytimefitness.co.uk

Facebook /AnytimeFitnessUK

Twitter /AnytimeFitUK

Instagram /AnytimeFitnessUK

Company profile

A franchise health club operation originating in the US and rapidly expanding globally, which offers 24/7 access to affordable, conveniently located facilities. Members have universal access to Anytime Fitness clubs worldwide.

Number of sites

165+ UK sites open in the UK. In total, 4,000+ sites globally in 35 countries, including the US, Canada, Japan, Australia, New Zealand, Mexico, UK and Ireland.

Plans for 2020

Increase our club opening programme towards 200 sites, focus on “making healthy happen” for members and our franchisees – looking beyond the realms of physical exercise to nutrition, rest (recovery) and mental wellness.

CEO: Neil Randall



Professional background

Over the last 20 years, I've worked across three main private health and fitness brands spanning all roles at club level, but also many of the key functions at HQ including marketing, sales and operations.

Best piece of advice you've ever been given

Coach, engage and nurture your team – include them as much as possible in your strategy. Strong teams will do likewise for your customers, building a great business.

People might be surprised to know that...

Back when I was a PT, one client was (the voice of) Yoda!

The Bannatyne Group

Power House, Haughton Road, Darlington, DL1 1ST

Tel +44 (0)1325 356 677

Email kimcrowther@bannatyne.co.uk

Web www.bannatyne.co.uk

Company profile

Bannatyne's Health Clubs targets a broad demographic and has a holistic approach to exercise and wellbeing. The brand is designed for people with a passion for living a healthy lifestyle, be they beginners or experienced health club users. It offers state-of-the-art equipment, an extensive range of group exercise classes, swimming pools, saunas, steamrooms and spa pools. Owned by chair Duncan Bannatyne, the group also operates spas and hotels.

Number of sites

72 health clubs, 47 spas and five hotels.

Plans for 2020

Invest in our sites and further develop our offering.

Executive chair: Duncan Bannatyne



Professional background

Business career began with an ice cream van bought for £450; expanded by buying more vans and eventually sold the business for £28,000, founding a care home business. After selling Quality Care Homes and kids' nursery chain Just Learning, I branched out into health clubs, bars, hotels and property.

Best piece of advice you've ever been given

If you want to start a business, just borrow, borrow, borrow. Invest the bank's money and get a better return.

People might be surprised to know that...

I paid £8,000 in a charity auction to be in a Guy Ritchie film!

BH Live

**Bournemouth International Centre, Exeter Road,
Bournemouth, BH2 5BH**

Tel +44 (0)1202 055555
Email enquiries@bhlive.org.uk
Web www.bhlive.org.uk
Facebook /SocialEnterpriseBHLive
Twitter /BHLIVE_UK

Company profile

A charitable social enterprise and leading operator of leisure and event venues in Dorset, Hampshire and London – delivering engaging experiences to promote better community health and wellbeing. Specialists in physical activity, sport, arts, culture, entertainment, ticketing, hospitality, conferences, exhibits and events.

Number of sites

17 sites (leisure centres, sporting venues, theatres, an entertainment/conference centre, high ropes, 30+cafes/bars, hospitality at Queen Elizabeth Olympic Park.

Plans for 2020

Significant investment programme with a focus on the customer journey and digitalisation across the business.

CEO: Chris Symons



Professional background

More than 30 years' experience in leisure – primarily growth and strategy in the Local Authority and Trust sectors.

Chris holds an Executive MBA (Imperial College) and is an alumni of the London Business School. Former Director for Development at GLL and is a Non-Executive Independent Director of Achieving for Children.

Best piece of advice you've ever been given

Learn something new every day.

People might be surprised to know that...

Turned 50 this year and decided to take up Krav Maga.

Be Military Fit

**Unit 15, Vision Industrial Park, Kendal Avenue, London, W3
OAF**

Tel +44 (0)20 8996 2220
Email fitness@bemilitaryfit.com
Web www.bemilitaryfit.com
Facebook /bemilitaryfit
Twitter /bemilitaryfit

Company profile

Be Military Fit is the UK's undisputed leader in outdoor fitness classes, delivering fitness classes in over 120 parks across the UK. The idea was, and still is, to get people of all fitness abilities outdoors training in parks, with motivation provided by military-trained instructors.

Number of sites

120 park locations are owned and operated by BMF.

Plans for 2020

In the UK, BMF will continue to own and operate sites in cities while franchising in smaller towns. The franchise model will be rolled out internationally, with China being a key market, before the US, India and the Middle East.

MD: Tommy Matthews



Professional background

Before joining Be Military Fit in May 2018, Matthews owned Athlete 4D Ltd; held the post of Head of Education at Escape Fitness in Peterborough; was a Managing Partner at Ushomi Training; and owned The Optimal Life Fitness Group. He took on the role of MD at BMF because he is open to a new challenge and wanted to get closer to members again; BMF represented a chance to work directly with a large membership base, understanding their needs, developing new programming, and improving the work out opportunities and membership experience.

Central YMCA

112 Great Russell Street, London, WC1B 3NQ

Tel +44 (0)20 7343 1700

Web www.ymca.co.uk / www.ymcafit.org.uk
www.ymcaawards.co.uk / www.ymcaclub.co.uk
www.ymcatraining.org.uk

Twitter /CentralYMCAUK
 /YMCAawards

Company profile

The Central YMCA movement was formed in 1844 and is the UK's leading wellbeing and education charity. It offers a complete set of awarding and training services covering the broad leisure industry's needs including fitness, horticulture, childcare, retail and management training.

Number of sites

Each of Central YMCA's ten centres is different, with a mix of training programmes and activities to meet local needs and employment opportunities.

Plans for 2020

Continuing to help people to live happier, healthier and more fulfilled lives.

CEO: Arvinda Gohil



Professional background

Arvinda Gohil comes to this role with extensive senior leadership experience from her former CEO role at Emmaus UK, a homeless charity, and the National Housing Federation. This extensive experience in community support and housing is successfully combined with her commitment and passion with enterprising support services for people from disadvantaged backgrounds. As former CEO of the Social Housing Foundation in South Africa, Gohil also brings international experience to the role. She was recently awarded an OBE for her services.

Circadian Trust

**Bradley Stoke Leisure Centre,
 Fiddlers Wood Lane, Bradley Stoke, BS32 9BS**

Web www.activecentres.org

Company profile

Circadian Trust operates sport and leisure centres in South Gloucestershire and has continued to improve its facility stock and services. Our mission is 'Inspiring Active Lifestyles'.

Number of sites

Responsible for five sites.

Plans for 2020

Investing in our online presence and digital systems at sites to enhance our customer experience. Looking to acquire new sites and partners.

CEO: Mark Crutchley



Professional background

A graduate with 30 years' leisure experience from the ground floor up. Previously worked in local government and for other trusts in roles such as operations and business development director. I've also managed community leisure facilities, events and attractions over the years.

Best piece of advice you've ever been given

Change happens – make it happen, don't let it happen.

People might be surprised to know that...

I played the lead role in *Oliver!* at primary school.

The Club Company

Bath Road, Knowl Hill, Reading, Berks, RG10 9AL

Tel +44 (0)844 561 1790

Web www.theclubcompany.com

Company profile

The Club Company's golf and country clubs combine a traditional golf environment with modern health and fitness facilities. The company's target quality facilities comprises individuals and families who value quality facilities and a high level of customer service. The Club Company was formed as a result of a management buy-out of Clubhaus in 2004.

Number of sites

15 golf and country clubs in the UK.

Plans for 2020

Investigate suitable acquisition opportunities; pursue internal investments at existing sites; open a 4-star hotel in June at Tytherington; hotel construction at Witney Lakes; implement holiday lodges at some of our sites.

CEO: Thierry Delsol



Professional background

I was an auditor before managing a subsidiary of a Japanese property company in France. I joined The Club Company (Clubhaus at the time) in 1997. Various roles led to my present position of chief executive officer, to which I was promoted in 2005.

Best piece of advice you've ever been given

Surround yourself with the best people.

People might be surprised to know that...

I enjoy training and competing in triathlons.

Dacorum Sports Trust

XC, Jarman Park, Hemel Hempstead, Hertfordshire, HP2 4JS

Tel +44 (0)1442 952 259

Email rebecca.hemmant@sportspace.co.uk

Web www.sportspace.co.uk

Company profile

Dacorum Sports Trust is a local charity that runs Our Gym, XC and Little Hay Golf Complex. Established in April 2004, we play a major part in improving the health of our community and in reducing social exclusion through sport. Any surplus is reinvested into our facilities.

Number of sites

Three.

Plans for 2020

Maximise opportunities at our extreme sport site by the inclusion of climbing and skatepark activities within the Olympics 2020. Develop local strategic partnerships to benefit the community.

MD: Rebecca Hemmant



Professional background

I've had over 30 plus years working in the leisure industry in both the public and charity sectors, I joining Dacorum Sports Trust in 1984, working in various roles including as operations director and now as managing director.

My drive is to encourage as many people as possible, from all walks of life, to be more physically active and to get involved with exercise and fitness.

Best piece of advice you've ever been given

It's always fine to speak your mind (sometimes!).

And also "Surround yourself with the RIGHT people."

David Lloyd Leisure

Mosquito Way, Hatfield Business Park, Hatfield,
Hertfordshire, AL10 9AX

Tel +44 (0)300 303 9531

Web www.davidlloyd.co.uk

Company profile

Europe's leading premium health, fitness and racquets group, David Lloyd Leisure comprises two brands: David Lloyd Clubs and Harbour Clubs, of which there are three at Chelsea, Kensington and Notting Hill in London. Owned by TDR Capital, David Lloyd Leisure has over 614,000 members and 8,100 employees, including an expert health and fitness team of over 2,000 and 680 tennis professionals.

Number of sites

99 sites in the UK and 15 clubs in mainland Europe.

Plans for 2020

Continued expansion across the UK and rest of Europe.

CEO: Glenn Earlam



Professional background

I previously worked in various roles at Merlin Entertainments for nearly 20 years, most recently as the managing director for Midway Attractions, Merlin's largest division encompassing Madame Tussauds, The Dungeons, The Eye, Sealife and Legoland.

Best piece of advice you've ever been given

People like to develop their own businesses rather than be told how to develop them.

People might be surprised to know that...

I used to be a fighter pilot in the Sri Lankan Air Force.

DW Fitness First

Whelco Place, Enfield Industrial Estate, Enfield St,
Wigan, WN5 8DB

Tel +44 (0)1942 219700

Web www.dwfitnessfirst.com

Twitter /dwfitnessfirst

Instagram /dwfitnessfirst

Facebook /dwfitnessfirst

Company profile

DW Fitness First is part of the DW Fitness First Group, operating both gyms and retail stores across the UK. We aim to reinvent our sector through the delivery of our positioning as the UK's No. 1 end-to-end sports participation brand: providing the products, environment and encouragement people need to participate in sport.

Number of sites

117 DW Fitness First sites.

Plans for 2020

To offer the best in-club and digital proposition for our members whilst providing a great place to work for our teams.

MD: Scott Best



Professional background

Scott Best is a long-time member of the DW team and has helped take the company from strength to strength, growing the business, organically and through acquisition, from some 53 clubs in 2009 to its current 121 clubs.

Best piece of advice you've ever been given

Working at the business is just as important as working in the business.

People might be surprised to know that...

Other than supporting Liverpool Football Club, skiing is my favourite pastime.

easyGym

The Plaza, 120 Oxford Street, London, W1D 1LT

Web www.easygym.co.uk

Company profile

easyGym is a high-value, low-cost model with a global franchising ambition. Benefiting from a brand that is widely recognised across Europe and beyond, easyGym is targeting multi-site entrepreneurs to join its growing network. easyGym is backed by private equity.

Number of sites

5 sites in the UK, 11 sites in France, 1 site in Kenya.

Plans for 2020

Five new sites opening in the UK, one site opening in Ireland, and one site opening in India.

CEO: Paul Lorimer-Wing



Professional background

A Deloitte-trained accountant who set up Fore Capital Partners, a venture capital platform from which easyGym was co-founded in 2009. Prior to that I managed a real estate portfolio for a London-based private equity house.

Best piece of advice you've ever been given

Seek the best in everything and everyone.

People might be surprised to know that...

I have broken par for 18 holes of golf, playing both right and left-handed.

Edinburgh Leisure

Vantage Point, 3 Cultins Road, Edinburgh, EH11 4DF

Tel +44 (0)131 458 2100

Email mail@edinburghleisure.co.uk

Web www.edinburghleisure.co.uk

Facebook /EdinburghLeisure

Company profile

Established in 1998, Edinburgh Leisure is an independent, not-for-profit charitable trust with an income of £22.5m. It aims to make a difference to communities by creating opportunities for everyone to get active and stay active. Our mission is to help Edinburgh be a healthy city.

Number of sites

30+: 5 pools and 6 golf clubs. Manage community access to sports facilities in 21 of our council's high schools.

Plans for 2020

To meet the known financial challenges and work with the City Council to complete the build and launch of the new Meadowbank Sports Centre.

CEO: June Peebles



Professional background

A BEd in Human Movement Studies propelled me into the sport and leisure industry, where I've worked ever since. I've had various jobs within this industry, initially working in the private sector, then local authority and latterly in the trust environment.

Best piece of advice you've ever been given

The more you put into life, the more you get out.

People might be surprised to know that...

I would have loved to have been a dancer and I'm a qualified, practising Pilates instructor.

énergie Fitness

énergie Central, 1 Pitfield, Kiln Farm,
Milton Keynes, MK11 3LW

Tel +44 (0)1908 396212

Email info@energiehq.com

Web www.energiefranchise.com

Facebook /effranchiseuk

Company profile

énergie Fitness is the leading UK low-cost gym franchise business with over 100 sites in the UK & Ireland. Through its scalable franchise model, énergie has empowered people to transform their lives since 2003. In August 2019, Bridges Fund Management, a specialist private markets investor, acquired a majority stake in énergie Fitness.

Number of sites

102 operating clubs in the UK and Ireland.

Plans for 2020

énergie will continue to drive the growth of small-box, low-cost gyms and broaden access to quality health and fitness facilities through its franchise model.

CEO: Neil King



Professional background

I've spent 25 years in the UK and European public and private sectors, becoming MD at ILife in 2013 before joining SLM. I was previously a board member of ukactive and SkillsActive, joining énergie in January 2018 as COO, before being appointed CEO in November the same year.

Best piece of advice you've ever been given

If you don't know, ask someone who does.

People might be surprised to know that...

If I hadn't had glandular fever aged 18, I was going to study theology and hopefully become a vicar.

Everybody Sport and Recreation

Brooklands, Holmes Chapel Community Centre, Station
Road, Holmes Chapel, CW4 8AA

Tel +44 (0)1270 685945

Web www.everybody.org.uk

Company profile

Everybody Sport and Recreation is an independent charitable trust operating predominantly in Cheshire. Key services include the management of 15 leisure facilities, the Everybody Academy training provider and our own in-house catering and hospitality arm, Taste for Life.

Number of sites

16

Plans for 2020

In partnership with Cheshire East Council, work will begin on over £17m of facility improvements at our Congleton, Nantwich, Barony and Poynton facilities.

CEO: Peter Hartwell



Professional background

Over 30 years' experience in private, public and now the charitable sector. I started work as an accountancy trainee before progressing through financial consultancy to general management, culminating in the creation of Everybody Sport and Recreation in 2014.

Best piece of advice you've ever been given

Find a way of working that shows you care; your people will respond and do their best too.

People might be surprised to know that...

I am a qualified ECB cricket coach.

Feelgood Fitness

**First & Second Floor, The George Shopping Centre,
Grantham, Lincolnshire NG31 6LN**

Email dave@myzone.org
Web www.feelgoodfitness.net &
www.voyagefitness.com.au

Company profile

Feelgood Fitness and Voyage Fitness are the first clubs in the world to have the technology system Myzone. They are a mid-market full service offering across two continents designed to cater for everyone. Many sites offer basic 24-hour access, provide ladies-only suites, and group training with a total membership base of 15,000+ members.

Number of sites

Nine sites.

Plans for 2020

Potentially sell Feelgood Haverhill, building a Nottingham city centre club and investing in Feelgood Grantham.

CEO/MD: Dave Wright



Professional background

A degree in recreation leadership and marketing with 30+ years focusing on people's behaviours around motivation and physical activity.

Best piece of advice you've ever been given

Take responsibility for your actions and subsequent results. Never say, 'I should of, could of, would of done anything'. You either did or you didn't!

People might be surprised to know that...

I have personally funded Myzone: it's now in 6,000 gyms in 64 countries with over one million users.

Fitness4Less

East Court, Jubilee Road, Finchampsted, RG40 3SD

Email info@fitness4less.co.uk
Web www.fitness4less.co.uk
Twitter /Fitness4LessUK
Facebook fitness4lessuk

Company profile

We were one of the first gyms offering the budget gym experience and we still maintain our values, offering a 'no catches - no brainer' membership to our customers. We aim to be accessible to all, fun and friendly, and ensure we provide a great range of free group fitness classes. It's our objective to encourage social interaction and a positive atmosphere at our facilities.

Number of sites

Fitness4Less currently has 9 sites.

Plans for 2020

On the look out for management contracts in the Trust sector as well as new sites.

Director: Steve Bradley



Professional background

The management team has all been in the leisure industry since leaving school or university. We have a good mix of operational, property and marketing skills between us. Personally, I have been involved in running all aspects of the business and have just celebrated 21 years with the company.

Best piece of advice you've ever been given

Just do it or else...

People might be surprised to know that...

I used to be an international 400m hurdler!

Fusion Lifestyle

4 Bickels Yard, 151/153 Bermondsey Street,
London, SE1 3HA

Tel +44 (0)20 7740 7500

Email info@fusion-lifestyle.com

Web www.fusion-lifestyle.com

Company profile

Fusion Lifestyle is an independent registered charity aiming to provide high-quality community health, fitness, sport and active leisure services for social and physical wellbeing. Services are delivered through leisure centres, sports facilities, gyms and pools, both independently and in partnership with voluntary and public sector organisations.

Number of sites

83 sports, leisure and community centres in the UK.

Plans for 2020

Continue to develop our portfolio, seeking collaborations and new locations that meet our strategic charitable objectives.

CEO: Peter Kay



Professional background

Over 30 years in private, public and not-for-profit sectors. More than 20 years' senior business and commercial management experience, together with extensive experience of project management and consultancy.

Best piece of advice you've ever been given

Never say 'never' – don't dismiss an opportunity out of hand without first taking a good look at it.

People might be surprised to know that...

My VW campervan is nearly as old as me.

Glasgow Life

38 Albion Street, Glasgow, G1 1LH

Tel +44 (0)141 287 4350

Email info@glasgowlife.org.uk

Web www.glasgowlife.org.uk

Company profile

A cultural trust that operates museums, libraries, cultural venues and leisure facilities across Glasgow. It's the biggest trust in Scotland, with an annual turnover of around £120m.

Number of sites

151 in total, of which 33 are sporting facilities including the Emirates Arena, the largest dedicated sports centre in Europe, Tollcross International Swimming Centre and the iconic Kelvin Hall.

Plans for 2020

We'll continue our work to make connections with the disengaged people in our community, and help our members achieve their personal health and fitness goals.

Director of Sport and Events: Billy Garrett



Professional background

I moved into sports at the Council 10 years ago, just before it adopted charitable status under the Glasgow Life brand, becoming Director of Sport and Events in 2017.

Best piece of advice you've ever been given

Never take things too personally.

People might be surprised to know that...

Relaunching our health and fitness memberships in 2018 saw a high of a 200 per cent increase in year-on-year monthly membership sales.

GLL

Middlegate House, The Royal Arsenal, London, SE18 6SX

Tel +44 (0)20 8317 5000

Web www.gll.org / www.better.org.uk

Company profile

A leading charitable social enterprise operating facilities and services with local councils, third sector bodies and standalone. 2019 saw GLL make further progress on its 5 Year Corporate Plan, setting out an ambitious digital expansion programme and innovations to enhance customer experience. Support for local communities and social enterprises in its supply chain was recognised with a SEUK award and a Silver Medal at the UK Business Awards.

Number of sites

270 leisure and gyms, 113 libraries, 10 children's centres.

Plans for 2020

Investment in digital, customer experience and products.

CEO/MD: Mark Sesnan



Professional background

With a career spanning some 40 years in public sector leisure and culture management, local government and senior leadership at GLL, I have worked at every level from poolside to Managing Director with all stops in between.

Best piece of advice you've ever been given

Make your job easier, surround yourself with good people.

People might be surprised to know that...

I ran my first marathon when I was 60.

The Gym Group

5th Floor, One Croydon, 12-16 Addiscombe Road, Croydon, CR0 0XT6

Tel +44 (0)20 3319 4823

Web www.thegymgroup.com

Facebook [thegymgroup](https://www.facebook.com/thegymgroup)

Twitter [@thegymgroup](https://twitter.com/thegymgroup)

Company profile

Founded in 2007 by Founder Director John Treharne, The Gym Group is the pioneer and national operator of 24-hour, high-quality, low-cost gyms, offering highly affordable gym memberships. This technology-led business recently invested in a new member management system and implemented a new Enterprise Resource Planning platform, enabling efficient delivery of back-office processes supporting continued growth of the company.

Number of sites

175 gyms.

Plans for 2020

Opening 15-20 standard gyms and up to 8 small box sites.

CEO: Richard Darwin



Professional background

Richard joined as CFO in 2015 and was promoted to CEO in 2018. He has extensive experience in leisure and FMCG companies and was previously CFO of Essenden plc and Paramount Restaurants. After qualifying as a Chartered Accountant, he worked with The Rank Group, Hard Rock Cafe International and Diageo.

Best piece of advice you've ever been given

Be true to yourself.

People might be surprised to know that...

I have no idea whether I am related to Charles Darwin.

Gymbox

Unit 7, 38 New Kent Road, London, SE1 6T

Tel +44 (0)20 7240 2959

Web www.gymbox.com

Facebook /gymbox

Company profile

Gymbox is a unique gym chain combining fitness with entertainment. We don't take ourselves too seriously, but we do take our workouts seriously. That's why everything we do, from our interiors to the people we hire and the classes we invent, has to inspire and excite, energise and ignite. The gym chain was refinanced in 2016 with significant investment from BGF and HSBC.

Number of sites

Gymbox has 11 sites in London.

Plans for 2020

To continue to drive growth in London and review regional and international markets.

CEO/MD: Marc Diaper



Professional background

I started out as a personal trainer and sports therapist in 2000 and worked with LA Fitness for seven years looking after the south coast before joining Gymbox in 2010 as sales director. I moved into the managing director role in 2014, then the CEO role in 2016.

Best piece of advice you've ever been given

If you always do what you've always done, you'll always get what you've always got.

People might be surprised to know that...

I played and won at Wembley.

gymophobics (Licence) Ltd

The Training Academy, Rickerscote Road, Stafford, ST17 4EX

Tel +44 (0)1785 227273

Email admin@gymophobics.co.uk

Web www.gymophobics.co.uk

Company profile

Gymophobics is a ladies' 30-minute gym concept with franchised centres throughout the UK. Our unique workout – Resisted Tension – integrates isotonic and isometric exercise, making it easy and fun for ladies who find conventional gyms intimidating. Our full-time national training academy in Stafford provides training for both franchisees and their staff in programme prescription, diet and exercise physiology.

Number of sites

54 franchises.

Plans for 2020

Recruiting more franchises.

Founder/Director: Donna Hubbard



Professional background

After a competitive swimming career, I studied in the USA to become a gym instructor and then a personal trainer. In 2003 I set up the Gymophobics franchise and in 2012 won the Fitness Industry Association's highest individual award for contributing most to the future of fitness in the UK.

Best piece of advice you've ever been given

Practice what you preach.

People might be surprised to know that...

I work out every morning at 6.30am.

Halo Leisure

Lion Yard, Broad Street, Leominster, Herefordshire, HR6 8BT

Tel +44 (0)845 241 0340

Web www.haloleisure.org.uk

Twitter @haloleisure

Company profile

Halo Leisure is a social enterprise with charitable status managing leisure centres in Herefordshire, Bridgend, Wiltshire and Shropshire. A wholly-owned trading subsidiary oversees consultancy work. It's one of only five social enterprises in the West Midlands to be awarded Flagship status.

Number of sites

22 leisure centres.

Plans for 2020

Develop further growth into current regions and continue our investment to develop our bespoke asset management software for the hospitality market.

CEO and director of operations: Scott Rolfe



Professional background

A leisure management professional with 25 years' experience working across local authority and charitable and social enterprise sectors.

Best piece of advice you've ever been given

Always be open to new ideas.

People might be surprised to know that...

In addition to managing leisure facilities, Halo is also the sector's leading supplier of asset management software with around 600 facilities in the UK benefiting from our solutions.

Hand Picked Hotels

The Old Library, The Drive, Sevenoaks, TN13 3AB

Tel +44 (0)1732 471 000

Email lbacon@handpicked.co.uk

Web www.handpicked.co.uk

Facebook handpicked hotels

Twitter /hp_hotels

Company profile

The Hand Picked Hotels collection, created by former City lawyer Julia Hands, comprises luxury country house hotels. All of its health clubs provide private membership and facilities for hotel and day spa guests, with gyms and studio classes, pools, hydro spas, experience showers, saunas, steamrooms, treatment and relaxation rooms.

Number of sites

19 hotels across the UK, including 11 health clubs and spas.

Plans for 2020

Upgrades to current portfolio and planning application for large improvements to one site.

Group health club & spa manager: Lesley Bacon



Professional background

I worked for Esporta as a club manager, European director and south-east regional manager, before joining Holmes Place Health Clubs as a regional manager. I've worked at Hand Picked Hotels for 12 years and recently received the Spa Professional of the Year award at the 2018 Hotel Cateys.

Best piece of advice you've ever been given

Don't be afraid to take a risk.

People might be surprised to know that...

I once cooked for Pavarotti!

High Five Health Promotion

Level 17, Dashwood House, 69 Old Broad Street,
London, EC2M 1QS

Tel +44 (0)20 7562 8943

Company profile

High Five is a professional and reliable partner in corporate fitness, vitality and sustainable employability. We have specific knowledge of corporate wellness services, behavioural change and tailor-made health and fitness programmes.

Number of sites

13 sites in the UK; total of 54 across the Netherlands, UK, Germany and Belgium. Also a contracted and certified network of 2,000 clubs in the Netherlands.

Plans for 2020

Strengthening our foothold in the UK, achieving growth of sites in Europe and increasing the member experience.

CEO: Eric Boer



Professional Background

Started career as a male nurse, before becoming an HR Director in the finance industry and a management consultant.

Have been COO at High Five since February 2017 before becoming CEO in January 2018. I have an MBA from Erasmus University.

Best piece of advice you've ever been given

You are in the driver's seat of your own career.

People might be surprised to know that...

I'm a marathon runner; it's important to be an active volunteer as well.

Hilton Worldwide (LivingWell Health Clubs)

Hilton Worldwide, Maple Court, Reeds Crescent,
Watford, Herts, WD24 4QQ

Tel +44 (0)20 7856 8000

Email matt.tailby@hilton.com

Web www.livingwell.com

Company profile

Hilton is a leading global hospitality company, spanning the lodging sector from luxury and full-service hotels and resorts to extended-stay suites and focused-service hotels. The company's portfolio includes 17 world-class global brands and an award-winning customer loyalty programme, Hilton Honors®.

Number of sites

39 LivingWell Health Clubs and 2 LivingWell Fitness sites.

Plans for 2020

Ongoing product improvement.

Director of Fitness Development & Operations, Europe: Matt Tailby



Professional background

I have 25 years' experience in the fitness industry in various roles, including fitness instructor, club manager and regional manager.

Best piece of advice you've ever been given

Life's too short. Make the most of every minute and every opportunity.

People might be surprised to know that...

I spend most of my spare time at the side of a football pitch watching my nine year old!

Impulse Leisure

**Head office – Blackshots Leisure Centre,
Blackshots Lane, Grays, Essex, RM16 2JU**

Tel +44 (0)1375 385363

Email mbaden@impulseleisure.co.uk

Web www.impulseleisure.co.uk

Facebook /impulseleisure

Twitter /impulseleisure

Company profile

Impulse Leisure is a non-profit-distributing organisation providing support services to local leisure charities, investing in facilities and services for the benefit of local communities. We encourage people to be physically active via the provision of great facilities, maintained to the highest standards, creating active and healthy communities with sports accessibility for all.

Number of sites

We operate nine leisure centres, an 18-hole golf course and entertainment venues in Essex and West Sussex.

Plans for 2020

Opening one new Gym Hub.

CEO: Mike Baden



Professional background

I have 40 years' experience working in the leisure sector, starting as a waiter, everything in between, and then the last 18 years as chief executive of the Impulse Leisure group of companies.

Best piece of advice you've ever been given

Don't eat the chicken if you still want eggs.

People might be surprised to know that...

My mum thinks I'm posh!

Passionately, but pragmatically, I support Everton Football Club.

JD Gyms

Hollinsbrook Way, Bury, BL9 8RR

Tel +44 (0)151 556 0842

Web www.jdgyms.co.uk

Facebook JD Gyms

Twitter @jdgyms

Company profile

JD Sports PLC's venture in the fitness industry continues to raise the bar in the premium low-cost gym market. JD Gyms has 30 clubs currently, with a further 15+ to follow through organic expansion in 2020. JD Gyms' 'seriously stylish, seriously affordable' offering combines premium equipment, high-quality group exercise provision, impeccable standards and cutting-edge interior design.

Number of sites

30 plus 15+ committed for 2020.

Plans for 2020

Continue to grow the JD Gyms estate through our award-winning formula.

MD: Alun Peacock



Professional Background

My career in the industry has spanned over 20 years with JJB Health Clubs/DW Sports Fitness, progressing from general manager to national operations director. I founded my own gym chain, in a private collaboration, before being head-hunted by JD Sports in 2013 to form JD Gyms.

Best piece of advice you've ever been given

Surround yourself with great people.

People might be surprised to know that...

I am a former world record holder.

Jubilee Hall Trust

30 The Piazza, Covent Garden, London, WC2E 8BE

Tel +44 (0)20 7395 4094

Email philrumbelow@jubileehalltrust.org

Web www.jubileehalltrust.org

Company profile

Jubilee Hall Trust is a charity founded in 1978 to build healthier communities by promoting the fitness and wellbeing of the individuals within them. We've remained true to our original aim and have expanded our outreach programmes to activate the most disadvantaged groups.

Number of sites

Four.

Plans for 2020

To re-launch our Covent Garden club after its major refurbishment, growing membership and income; to start a new GP Referral scheme; and to increase the range and scale of our community programmes.

CEO: Phil Rumbelow



Professional background

I have more than 30 years' experience in the leisure industry, including 20 years in the not-for-profit sector. I am a Fellow of both the Institute of Directors and of CIMSPA; Chair of the ukactive Membership Council and a Director of ukactive; and Vice-Chair of Sporta.

Best piece of advice you've ever been given

Live, love, learn and leave a legacy.

People might be surprised to know that...

I was a Gamesmaker at the London 2012 Olympics!

Life Leisure

Life Leisure Head Office, Life Leisure Houldsworth Village, Broadstone Road, Reddish, Stockport, Cheshire, SK5 7AT

Tel +44 (0)161 482 0900

Web www.lifeleisure.net

Company profile

Life Leisure is a not-for-profit social enterprise and registered charity formerly known as Stockport Sports Trust. We seek to provide a best-value service in all areas of the borough, operating a mix of sports and leisure facilities. We express our vision as follows: 'We live for fitness. We live for sport. We live for improving the lives of the people around us.'

Number of sites

Thirteen sites: 12 in Stockport and 1 in Barrow-in-Furness, Cumbria.

Plans for 2020

To win at least 3 more new external contracts.

Group CEO: Malcolm McPhail



Professional background

Elected CIMSPA Board Member and UK Active Board Member 2012-2015. I was the first General Manager at Next Generation's flagship club in Edinburgh. The company went on to build 18 clubs in the UK and Australia and then merged with David Lloyd Leisure; great years.

Best piece of advice you've ever been given

Your wounds are a legacy of the past.

People might be surprised to know that...

I'm the North of England and Scottish 100m Champion (M50), and also ranked No.2 for the long jump in the UK.

Lifestyle Fitness

**Competition Line (UK) Ltd, 91 East Mount Road,
Darlington, Co. Durham, DL1 1LA**

Tel +44 (0)1325 529800

Web www.lifestylefitness.co.uk

Facebook /lifestylefitness.co.uk

Company profile

With 35+ years in the fitness industry, Lifestyle Fitness has become a leading developer and operator of fitness facilities, primarily in association with local partners like colleges, schools, academies and community associations. It provides high-quality facilities, best-in-class member experience and commercial revenue.

Number of sites

27 across the UK.

Plans for 2020

Implementing our planned new sites and continuing to seek new ways to help partners improve health and fitness in their local communities.

Chair: Tim Curtis



Professional background

After over 20 years as a multichannel retailer, with Boots, Mothercare and Lands End, I joined Lifestyle Fitness at the end of 2016 and have helped the team refocus on our core business of operating high quality fitness clubs in conjunction with local partners and communities.

Best piece of advice you've ever been given

Things are rarely as good, or as bad, as they first seem.

People might be surprised to know that...

As a Para Engineer, I set up the first Bomb Disposal troop with Airborne forces.

Link4Life

**Floor 3, Number One Riverside, Smith Street
Rochdale, OL16 1XU**

Tel +44 (0)1706 926 232

Web www.link4life.org

Facebook /yourLink4Life

Company profile

Link4Life is a charity that works in the heart of the Rochdale Borough community. Our vision is for 'communities that are active, creative and healthy' and we aim to deliver high quality, enjoyable, affordable and accessible culture and leisure provision in the region.

Number of sites

Nine sites.

Plans for 2020

To continue to deliver high quality, enjoyable, affordable and accessible culture and leisure provision in the region.

CEO: Andy King



Professional background

A Chartered Fellow of CIMSPA and former director with Serco and GLL. Previously CEO of Carlisle Leisure Limited in Cumbria. Opened the first Virgin Active club in 1999 and has held posts with Fitness First, Next Generation and Horsham District Council.

Best piece of advice you've ever been given

Seek first to understand before being understood.

People might be surprised to know that...

I was a drummer in a punk band called The Crack, winning the first ever televised Battle of the Bands!

Matt Roberts Ltd

16 Berkeley Street, London, W1J 8DZ

Tel +44 (0)20 7491 9989

Web www.mattroberts.co.uk

Twitter /mattrobertspt

Instagram @mattrobertspt / @mattroberts_lifestyle

Facebook /mattrobertspersonaltraining

Company profile

Matt Roberts Personal Training caters for more than 1,200 private clients in London, who are managed by a team of personal trainers. Matt Roberts has written 14 best-selling books.

Number of sites

A fitness and wellness club in Mayfair, London, plus three retreats: Lime Wood, The Langley and The St Regis.

Plans for 2020

Currently planning and implementing strong growth and a development plan for new sites, services and products. In discussion about a plethora of new opportunities.

CEO: Matt Roberts



Professional background

Roberts started the company over 20 years ago and has remained a pioneer in the industry since that time. Having worked with a large number of companies, media and with the public sector, Matt is experienced and has solved problems in a wide range of arenas.

Best piece of advice you've ever been given

If you can't explain your concept in 20 seconds, it'll never get traction.

People might be surprised to know that...

I train clients on a daily basis – it's in the blood!

Mosaic Spa & Health Clubs

Fitness Express, Park Farm, Hethersett, Norwich, NR9 3DL

Tel +44 (0)1603 812 727

Web www.mosaicgroup.co.uk &
www.imaginespa.co.uk &
www.fitnessexpress.co.uk

Company profile

Mosaic owns The Shrewsbury Club and Holmer Park Health Club & Spa. Our contract management division operates health clubs and day spas for hotels under our Imagine and Fitness Express brands, or the hotel's brand. We offer a licence service for BOOST CRM software.

Number of sites

26.

Plans for 2020

A number of new sites; a partnership with a spa therapist school within a leading university; investment in some contract managed sites; a learner pool at our Shrewsbury site; and an outdoor spa garden at our Holmer Park Club.

MD: Dave Courteen



Professional background

Set up Mosaic with co-founder Steve Taylor, straight from university, before working on various industry bodies with ukactive. Responsible for working on the first drafts of the Industry Code of Practice. An established speaker at conferences and sits on LEP Business Board in Shropshire.

Best piece of advice you've ever been given

A smile is the shortest distance between two people.

People might be surprised to know that...

I had a book published in 2019 called "More to Gain Than Just the Game" and Judy Murray wrote the foreword.

Mytime Active

4th Floor, Linden House, 153-155 Masons Hill,
Bromley, BR2 9HY

Tel +44 (0)20 8323 1777

Web www.mytimeactive.co.uk

Company profile

At Mytime Active we are on a mission to improve the wellbeing of the community we work in. Everyone is welcome to join our award-winning programmes and services. We understand people and make it easy for them to access a range of activities, from gyms, golf and swimming to weight management and soft play, in our vibrant, inclusive and social spaces.

Number of sites

22 leisure centres and golf courses.

Plans for 2020

To consolidate our overall offering on active and healthy lifestyles, continuing to invest and grow for the future.

CEO: Marg Mayne



Professional Background

With 20 years' experience at board level, I've spent my working life bringing business and commercial disciplines to organisations that have a broader social purpose. My career has spanned housing associations, charities, cultural organisations and international NGOs.

Best piece of advice you've ever been given

There's no such thing as luck – good things happen when opportunity meets preparedness.

People might be surprised to know that...

My parents met over a gooseberry bush – honestly!

Nuffield Health

Nuffield Health, Epsom Gateway Building,
Ashley Avenue, Epsom, Surrey, KT18 5AL

Tel +44 (0)20 8329 6200

Web www.nuffieldhealth.com

Company profile

The UK's largest healthcare charity and its experts have been working together to make the nation fitter, healthier, happier and stronger, all for the public benefit. As an organisation with no shareholders, Nuffield Health invests all its income back into its vision to build a healthier nation through outstanding day-to-day services through its family of sites and through its flagship programmes to support communities by widening access.

Number of sites

31 hospitals, 112 clubs, 200+ workplace wellbeing sites, 5 medical centres and 1 diagnostic suite.

Plans for 2020

To build a healthier nation.

CEO: Steve Gray



Professional background

Over 25 years' experience working primarily in the healthcare sector, providing strategic insights into the UK healthcare market. Spearheading the acquisition of an emotional counselling business in 2016, making Nuffield Health the only independent healthcare provider to offer a comprehensive list of health and wellbeing services.

Best piece of advice you've ever been given

Most things can be resolved over a chat and a cup of tea.

People might be surprised to know that...

I once played professional football in Spain.

Parkwood Leisure

Attwood House, Perdiswell Park, John Comyn Drive,
Worcester, WR3 7NS

Tel +44 (0)1905 388500

Web www.leisurecentre.com
www.parkwoodleisure.co.uk

Company profile

Parkwood Leisure is a family owned leisure management company working with local authority partners across England and Wales. Established 25 years ago, Parkwood offers bespoke management experience in leisure centres, theatres and visitor attraction facilities, including country parks.

Number of sites

100 sites, including 73 gyms.

Plans for 2020

Our aim is to retain our core DNA but also to embrace innovation and ensure that this drives continued improvement.

MD: Glen Hall



Professional background

I have dedicated my entire working career to leisure management and for the last 22 years helping grow Parkwood Leisure from five sites, when I first joined, to nearly 100. I have been a Board Director since 2006 and now lead a dedicated team of like-minded leisure professionals.

Best piece of advice you've ever been given

Pay attention to detail and don't be afraid to make decisions!

People might be surprised to know that...

My wife swam for England.

Places Leisure

Waters Edge, Riverside Way, Watchmoor Park,
Camberley, Surrey, GU15 3YL

Tel +44 (0)1276 418 200

Email enquiries@pfpleisure.org

Web www.placesleisure.org

Company profile

Places Leisure is a social enterprise owned by the Places for People Group, an award-winning property management company that creates aspirational homes and inspirational places. It specialises in developing and managing leisure facilities on behalf of its local authority partners and has been named Quest's Top Performing Organisation for the last four consecutive years.

Number of sites

More than 100.

Plans for 2020

Exploring opportunities to build new leisure venues, creating active places for healthy people.

CEO: Sandra Dodd



Professional background

I'm a chartered management accountant who has worked in the business for over 20 years. I was appointed CEO in 2014 having served 12 years as Finance Director. I enjoy working closely with our industry partners and am currently Treasurer of the ukactive board and sit on the CIMSPA and Badminton England Board.

Best piece of advice you've ever been given

It's nice to be important, but it's important to be nice.

People might be surprised to know that...

I'm a keen scuba diver.

PureGym

Town Centre House, The Merrion Centre, Leeds, LS2 8LY

Tel +44 (0)113 831 3333

Email info@puregym.com

Web www.puregym.com

Facebook /puregym

Company profile

Following the acquisition of Fitness World in January 2020, PureGym is now the second largest gym and fitness operator in Europe, providing low-cost and high-quality fitness facilities for over 1.7 million members across 500 sites in the UK, Denmark, Switzerland and Poland. Founded in 2009, PureGym pioneered the model for affordable, flexible, high-quality fitness clubs.

Number of sites

260+ (UK); 500+ (UK and Europe).

Plans for 2020

To integrate with Fitness World, open trial sites in the USA and continue organic growth in the UK.

CEO/MD: Humphrey Cobbold



Professional background

Previously CEO of online cycle and triathlon goods retailer Wiggle. Grew Wiggle's international business in Europe, plus Japan, Australia, USA and China. Extensive business experience via management consultancy with McKinsey & Co, private equity with Candover, Director of Strategic Development at Trinity Mirror.

Best piece of advice you've ever been given

Try new things – regret is more painful than failure.

People might be surprised to know that...

I'm a season ticket-holding Arsenal fan: a labour of love...

RBH

The Mille, 1000 Great West Road, Brentford, TW8 9DW

Web www.rbhmanagement.com

Company profile

RBH, the UK's leading independent hotel management company, manages a diverse collection of branded and private label hotel properties. Working in partnership with five of the most prestigious international hotel brands (IHG, Hilton, Accor, Marriott and Wyndham), RBH is a driving force in the industry and has an annual turnover under management in excess of £200m.

Number of sites

47 hotels across the UK.

Plans for 2020

Continuing to deliver operational excellence across the board, and adding to our growing portfolio.

Chief Operations Support Officer: Susan Bland



Professional background

Susan brings more than 20 years of operational experience to the RBH team and leads the business in the areas of leisure, spa, procurement, F&B and human resources. Susan leads from the front and her infectious desire to see others succeed drives development across her team, delivering exceptional results for each hotel under RBH management. With 1,900 employees under management, Susan spearheads RBH's collective commitment to its values.

Rize

We Are Rize Ltd, C/O 18-20 Scrutton Street, London, EC2A 4RX

Email info@wearerize.co.uk

Web www.wearerize.co.uk

Company profile

Rize (former Movers & Shapers) provides super-convenient, coached exercise classes for members who prefer social workout choices in a relaxed environment. We use positive psychology to create a feel good experience – no pressure, easy to exercise (timing, choice and convenient location), inclusive and friendly, private and social.

Number of sites

3: Balham, St Margaret's (Twickenham) and Queens Park.

Plans for 2020

Looking for new sites to grow our portfolio following a successful re-brand in 2018.

Operations Director: Heidi Blackburn



Professional background

Started work in the industry in 1994. Having operated successfully in numerous roles within Dragons Health Clubs and LA Fitness, I moved across to join The Health Club Collection in 2008 as a professional in the design and operation of their health and fitness clubs and boutique studios throughout the City of London. In 2017, I took the operational lead on the three Rize Studios and I'm currently looking at sites to develop our unique operations to continue to revitalise sport and leisure in the UK.

Roko Health Clubs

Wilford Lane, West Bridgford, Nottingham, NG2 7RN

Web www.roko.co.uk

Company profile

Roko Health Clubs is part of The Sports & Leisure Group. It is a premium health club and spa business, averaging 35,000sq ft at each site and provides a full spectrum of facilities and services at affordable prices. We specialise in member engagement through our 'get fit, stay fit' promise and a keen focus on the member journey which is helping to deliver exceptional sales and retention levels.

Number of sites

5

Plans for 2020

Having launched a new Roko app, we are looking at taking our customer engagement to a whole new level.

MD: Neil Stanton



Professional background

Neil Stanton has worked in hospitality and leisure for nearly 30 years across sales, marketing and operational roles; most recently at Roko growing the business from 1 to 5 sites.

Best piece of advice you've ever been given

Perspective always depends on where you're standing.

People might be surprised to know that...

I started doing triathlons three years ago and in 2019 I completed my first Full Ironman in my 50th year. Loved it!

SIV

23 Carbrook Hall Road, Sheffield, S9 2EH

Tel +44 (0)114 223 3800

Email andrew.snelling@siv.org.uk

Web www.siv.org.uk

Company profile

SIV is the operating company for a registered charity, Sheffield City Trust, and operates a range of sport, leisure and entertainment venues. It is dedicated to encouraging community and elite participation, promoting the region's image and boosting its health and economy.

Number of sites

Eight leisure centres, five golf clubs and four entertainment venues.

Plans for 2020

Our aim is to benefit the health and wellbeing of everyone in our region.

CEO: Andrew Snelling

Professional background

Having trained as a chartered accountant, I moved into the not-for-profit sector 23 years ago. Formerly SIV's Deputy Chief Executive, I became the company's CEO in August 2017. I'm fully committed to improving the health and fitness of the whole of Sheffield.

Best piece of advice you've ever been given

Always be open and honest with people.

People might be surprised to know that...

Fitness Unlimited is 20 years old this year.



Sodexo (Healthworks)

1 Southampton Row, London, WC1B 5HA

Tel +44 (0)207 4040110

Email healthworks.group@sodexo.com

Web www.sodexo.com

Company profile

Sodexo provides a diverse range of services to business and public sector clients. Our solutions include food and catering, facilities management, property and technical services and benefits and rewards. These improve the quality of life for those we serve. Within our divisions, we provide health and wellbeing solutions, from the gym to virtual solutions alongside health and wellbeing services.

Number of sites

40 clubs in the UK and Ireland.

Plans for 2020

Improve the health and wellbeing of all those we serve by providing innovative solutions and improving quality of life.

Development manager (Sodexo): Alan West

Professional background

Started out as a fitness instructor for Savoy Group, leaving in 1997 as operations manager. Helped design, launch and operate two award-winning destination spas for private hotel chains in the Midlands. Joined Sodexo in 2002 as account manager and progressed to development manager.

Best piece of advice you've ever been given

Surround yourself with motivated and inspirational people.

People might be surprised to know that...

I'm a passionate Evertonian, it completely controls my life.



Sports & Leisure Management (SLM – Everyone Active)

2 Watling Drive, Sketchley Meadows, Hinckley, LE10 3EY

Tel +44 (0)1455 890 508

Web www.everyoneactive.com

Facebook /everyoneactive

Twitter /everyoneactive

Company profile

Having formed in 1987, SLM Ltd is the longest-established leisure contractor in the UK. We offer award-winning facilities and services to local communities across the country on behalf of our Trust and local author partners, ensuring more people are able to benefit from enjoyable and affordable ways of getting active.

Number of sites

190+ leisure facilities with over 60 local authorities.

Plans for 2020

To explore and develop new digital innovations to make getting active as easy as possible and to expand our portfolio and develop relationships with local authorities.

MD: David Bibby



Professional background

I'm a chartered accountant and joined Everyone Active as finance director in 1992. I was promoted to MD in 2006.

It's been highly rewarding for me to see our new brand develop, overseeing significant investment programmes in our centres and gaining industry recognition for all the hard work our team puts in.

Best piece of advice you've ever been given

See the bigger picture.

People might be surprised to know that...

Other than football, skiing off-piste is my favourite sport.

Sports Direct / Everlast Fitness

Unit A, Brook Park East, Shirebrook, NG20 8RY

Web www.sportsdirectfitness.com

Facebook /SportsDirectFitness

Company profile

Sports Direct Fitness and Everlast Gyms comprise the health club offering from retail giant Sports Direct which launched in June 2014 with the acquisition of a number of sites from LA Fitness. Having successfully opened a range of brand new fitness clubs across the UK since then, the focus is to continue to grow from strength to strength with more fitness clubs scheduled to open in 2019.

Number of sites

34 sites.

Plans for 2020

Opening four more Everlast gyms, taking our total to 38.

Head of Leisure: Winston Higham



Professional Background

Working with various design agencies in the entertainment industry, before joining the leisure sector; at JJB Sports as design and marketing director, serving as CEO of DW Sports and now Head of Leisure Sports Direct Fitness.

Best piece of advice you've ever been given

Never over-promise, always over-deliver by a bit. Never kill an idea in a meeting.

People might be surprised to know that...

I once danced on stage at the Tokyo Music Festival with Frank Sinatra and Raquel Welch.

Stevenage Leisure (SLL)

**Stevenage Arts & Leisure Centre, Lytton Way,
Stevenage, Hertfordshire, SG1 1LZ**

Tel +44 (0)1438 242 233

Email ian.morton@sll.co.uk

Web www.sll.co.uk

Company profile

SLL is a leading leisure management registered charity celebrating 21 years in 2019, working in partnership with eight organisations to deliver leisure, health, wellness, cultural and educational services for the whole community at affordable prices.

Number of sites

24.

Plans for 2020

SLL are working in collaboration with InspireAll, a similar leisure trust based in Hertsmere. Together we hope to improve the financial position of both trusts combined by mixing specialist skills to improve service delivery.

CEO: David Brame



Professional background

A founder director of Leisure Connection, Brame also worked at Nuffield as Commercial Director in the corporate wellbeing division and then Group Commercial Director for HighFive in Amsterdam. In 2016, he became CEO of Hertsmere Leisure Trust (InspireAll), responsible for almost 40 leisure and community facilities. In January 2020 InspireAll and SLL joined in collaboration to improve the combined financial performance and service delivery for both companies. I am honoured to have been given the chance to lead as CEO on such a wonderful opportunity.

Tees Active

**Redheugh House, Thornaby Place,
Thornaby, Stockton on Tees, TS17 6SG**

Tel +44 (0)1642 527 322

Email leon.jones@teesactive.co.uk

Web www.teesactive.co.uk

Company profile

A social enterprise formed in 2004 and operating in Stockton-on-Tees. We focus on service quality, increasing participation, expanding our business, community engagement and intervention services. Clients include local authorities, private/public sector organisations and the Canal and Rivers Trust.

Number of sites

Six major facilities.

Plans for 2020

Developing a new community leisure centre at Ingleby Barwick and expanding the adventure offer at Tees Barrage International White Water Centre.

CEO/MD: Leon Jones



Professional background

With a passion for sport, I graduated in business and marketing before gaining 20 years' leisure experience in commercial and marketing roles. I've developed a career in private health clubs, within local authorities and leisure trusts, joining Tees Active in 2010 and becoming MD in early 2018.

Best piece of advice you've ever been given

Remember, hard work beats talent when talent doesn't work hard.

People might be surprised to know that...

I restore 70s' and 80s' old school BMXs.

Third Space

16–19 Canada Square, Canary Wharf, London, E14 5ER

Tel +44 (0)20 7970 0900

Web www.thirdspace.london

Company profile

First opened in 2001 in the heart of Soho, Third Space is a ground-breaking group of unique spaces dedicated to training for life. The first clubs to see true health as diverse, individual and long term, they combine world-class facilities and expertise with a bespoke approach, catering from every health and fitness need whether that be in training, medical, recovery or nutrition.

Number of sites

Six sites: Soho, Marylebone, Canary Wharf, , Tower Bridge, City and Islington.

Plans for 2020

To improve the member experience.

CEO: Colin Waggett



Professional background

I have over 10 years' experience in the health and fitness industry having been the global CEO of Fitness First, as well as co-founder of Psycle, a boutique gym with a focus on indoor cycling in central London. Third Space aims to serve the fitness-savvy Londoner who appreciates the very best quality in service.

Best piece of advice you've ever been given

Focus on what you can change.

People might be surprised to know that...

No surprises. You get what you see.

Tonbridge & Malling Leisure Trust

1-5 Martin Square, Larkfield, Aylesford, Kent, ME20 6QL

Tel +44 (0)1732 876 150

Web www.tmactive.co.uk

Twitter /tmactiveleisure

Company profile

TMLT was formed in 2013 as an independent charitable trust operating leisure facilities in the borough. The trust has a turnover in excess of £6.4m and over one million customers per annum. The brand, tmactive, is focused on the national agenda, delivered locally. The mission is to provide a clean, safe and happy experience for the health and social wellbeing of residents and visitors.

Number of sites

Four – including a golf course.

Plans for 2020

Major project to remodel a key facility; focus on health and wellbeing strategy; rebrand catering and consolidate takeover of dance school.

CEO: Martin Guyton



Professional Background

Over 35 years in the industry, starting as a lifeguard in my local pool. An abiding interest in sport and leisure has kept me in the industry. I have an MBA gained with distinction, work as a Quest Assessor and have chaired the South East Leisure Centre Operators network for over 15 years.

Best piece of advice you've ever been given

Be hard on the problem, soft on the people.

People might be surprised to know that...

I once turned down a game of golf!

TRIB3 International

No. 1 Spinningfields, Quay Street, Manchester, M3 3JE

Email franchise@trib3.co.uk

Web www.trib3.co.uk

www.trib3.co.uk/franchise

Company profile

TRIB3 is a unique boutique fitness concept bringing people together through next-level workout experiences. One 45-minute HIIT session with three elements:

Treadmills, Resistance and Intensity (TRI) underpinned by performance tracking technology with a custom shake bar and retail offering. The workout is scientifically-programmed around effort-level rather than ability.

Number of sites

8 currently operating across UK, Spain, Finland, Russia & China. Four franchised and four corporately-owned.

Plans for 2020

Seven openings across UK and Spain with plans to open at least 16 stores across these regions before year-end.

CEO: Kevin Yates



Professional background

Since the mid-90s, I've worked across numerous major operators, including Fitness First, creating and growing disruptive concepts in the health and leisure sector. I created TRIB3 in 2016, after being on the founding board of IRebel. TRIB3's vision is to deliver a unique and next-level workout experience that brings people together.

Best piece of advice you've ever been given

People always have a reason, you just have to find the why.

People might be surprised to know that...

I read at least 1 book a week and have crazy adventures.

Virgin Active

Active house, 100 Aldersgate Street, London, EC1A 4LX

Tel +44 (0)20 7786 7300

Web www.virginactive.co.uk

Facebook /virginactiveuk

Twitter /VirginActiveUK

Blog www.virginactive.co.uk/active-matters/blog

Company profile

Virgin Active is one of the world's leading health club operators, with an aim to inspire people to live an active life. Founding in the UK in 1999, it now operates across eight countries. Its health clubs offer a wide variety of high quality exercise experiences delivered by its engaged and well trained people: from gym floor, to group exercise classes, PTs, pools, spa areas, kids facilities and cafes.

Number of sites

240 globally; 42 in the UK.

Plans for 2020

Investment in its product including group exercise classes and online content.

UK MD: Ashley Aylmer



Professional background

Since 2006 Aylmer has undertaken roles as part of Virgin Active's global team to help grow the brand. Since November 2019 he's led the UK business, taking responsibility for its strategy and day to day business management. Previously, Ashley was a corporate finance lawyer at Allen & Overy LLP with a focus on M&As and IPOs.

Best piece of advice you've ever been given

Treat others as you would like to be treated.

People might be surprised to know that...

I'm very allergic to most animals, so we can't have a dog.

West Lothian Leisure

Head Office, Xcite Bathgate Leisure Centre, Balbardie Park, Torphichen Road, Bathgate, West Lothian, EH48 4LA

Tel +44 (0)1506 237 870

Email tdent@westlothianleisure.com

Web www.westlothianleisure.com

Company profile

A Community Leisure Trust with a vision to ensure everyone in West Lothian can live a healthier, happier and more active life. We provide fitness, sport, outdoor and cultural activities through our branded Xcite venues; manage local schools, a theatre, golf courses and an outdoor education centre; and deliver health outreach.

Number of sites

21.

Plans for 2020

Refresh and leverage our charitable purpose; integrate recently transferred venues and maximise their potential; build on our reputation for excellent customer service; business growth and improvement.

CEO: Tim Dent



Professional background

Over 30 years sport and leisure management experience encompassing operations, strategic and project management. Joined West Lothian Leisure in October 2019. Previously a Founding Director of a leading sport and leisure management consultancy in Scotland and held senior roles with EventScotland, PMP Consultancy, Midlothian Council and Bannatyne's Fitness. Tim is a fellow member of the Chartered Institute for the Management of Sport and Physical Activity.

Xercise4Less

Unit 1, Kirkstall Industrial Estate, Kirkstall Road, Leeds, LS4 2AZ

Tel +44 (0)113 203 8668

Email peter@xercise4less.co.uk

Web www.xercise4less.co.uk

Company profile

Xercise4Less currently operates 52 clubs across the country and offers the largest range of equipment and facilities in the low-cost sector. Clubs are typically over 30,000sq ft and include large spinning and group exercise studios along with a dedicated ladies-only zone. Known as the people's gym, Xercise4Less prides itself on retaining a team of friendly and welcoming staff in every club.

Number of sites

51 sites.

Plans for 2020

Continued investment in and improvement of the existing estate as member numbers continue to grow.

CEO/MD: Peter Wright



Professional background

I've been in the health and fitness sector for over 25 years, starting at industry leader LivingWell health and leisure, before launching Virgin Active as one of the founding directors. Most recently, I've developed the low-cost chain MacFit in Turkey, developing and growing it to 70+ clubs.

Best piece of advice you've ever been given

There's always a way...

People might be surprised to know that...

I raced bicycles competitively for 10 years in South Africa.

You Fit Health & Leisure Clubs (Kew Green Hotels)

1 Towers Place, Richmond, Surrey, TW9 1EG

Tel +44 (0)208 334 4830

Email justin.andrews@kewgreen.co.uk

Web youfitclubs.co.uk / kewgreen.co.uk

Company profile

Kew Green owns and manages full service hotels and is Europe's largest franchise of IHG-branded hotels. Within the UK we have 22 You Fit branded health & leisure clubs with independent membership, all of which include both wet and dry-side facilities.

Number of sites

22 health clubs.

18 hotel gyms.

Plans for 2020

Increase the portfolio of You Fit Clubs through management contracts and further investment in facility upgrades across much of the estate.

Director of Leisure: Justin Andrews



Professional background

I worked as a fitness director in New Zealand and held regional/senior management posts in the health club industry before joining Kew Green in 2014 to oversee the strategic direction of its health clubs.

Best piece of advice you've ever been given

Don't act on your immediate emotion; give it time before you make a decision.

People might be surprised to know that...

I owned a surf brand company specialising in hand-crafted retro longboards.

Your Leisure Kent Ltd

**Discovery Park, Innovation House, Innovation Way,
Sandwich, Kent, CT13 9ND**

Tel +44 (0)1843 868 302

Email info@yourleisure.uk.com

Web www.yourleisure.uk.com

Company profile

Community Benefit Society managing leisure, foreshore, hospitality, entertainment and community services in East Kent, improving the health and wellbeing of residents in the region.

Number of sites

10 sites.

Plans for 2020

To continue to develop and improve Your Leisure's financial performance through investment in our services, facilities and in our people. In addition, we will continue in our mission to make a difference to the lives of local people.

MD: Kevin Fordham



Professional background

Thirty plus years' experience in the leisure industry within the private, public and trust sector organisations, supported by professional qualifications in management and marketing.

Best piece of advice you've ever been given

There is no elevator to success – you have to take the stairs.

People might be surprised to know that...

I support two football teams and don't know which team I prefer!

HCM

HANDBOOK 2020

WHO'S WHO

European operators

Who are the key players in your market? We take a look at some of Europe's leading health club chains

Altafit

c/Villanueva no. 24, 30 28001 Madrid, Spain

Web altafitgymclub.com / mystgymclub.com

Facebook /altafitgimnasios

Twitter @Altafit

Instagram @altafitgimnasios

Email hola@altafit.es

Company profile

Altafit is the largest chain of gyms in Spain. The brand embraces the goal of being more than a gym, offering a high quality service at a fair price. Launched in 2012, Altafit created a second premium brand, Myst Gym Club, in 2015. In 2018, the Spanish brand Ifitness, with 14 gyms, was added to the Altafit group, strengthening further the brand's leadership in the country.

Number of sites

More than 65 gyms.

Plans for 2020

Fifteen new clubs opening in Spain.

CEO: José Antonio Sevilla



Professional background

BSc in physical activity and sport, and a Masters in the management of sport organisations. CEO at Altamarca, managing municipal sports services of San Sebastián de los Reyes (Madrid). Founding partner of Altafit Gym Club, Myst Gym Club and Hexxa sport technology brand. Member of the association of entrepreneurs.

Best piece of advice you've ever been given

Life can be wonderful.

People might be surprised to know that...

I do sport every day. It's my profession and my passion.

Anytime Fitness

111 Weir Drive, Woodbury, MN 55125, USA

Tel +1 651 438 5000

Web www.anytimefitness.com

Company profile

Ranked #1 on *Entrepreneur's* prestigious 'Top Global Franchise' list for two consecutive years, Anytime Fitness has been the fastest-growing gym franchise worldwide for 11 straight years. Nearly 5,000 gyms serve 4 million members on 5 continents. Open 24/7, 365 days a year, we provide convenient fitness options and a personal service.

Number of sites

Nearly 5,000 gyms are now open in 35 countries.

Plans for 2020

After recently signing new franchising agreements in South Africa, South Korea and Vietnam, we'll open 100 new gyms throughout Europe and 500 gyms worldwide.

Executive VP of International Development: Raj Kumar



Professional background

With over 24 years' experience in retail consumer goods and franchising, working in-market in Asia, Europe and North America in general management and marketing roles.

Best piece of advice you've ever been given

Be the catalyst to bring everyone along and deliver your desired goal.

People might be surprised to know that...

I've been around the world on a boat large enough to be a cruise ship.

Aspria

Hill Place House, 55a High Street, London, SW19 5BA, UK

Tel +44 (0)20 8944 4070

Web www.aspria.com

Company profile

Managed by chief executive officer Brian Morris, Aspria Holdings BV offers unique members' clubs for culture, business, sport and wellbeing across various brands: Aspria Clubs, Royal La Rasante and the Harbour Club.

Number of sites

Aspria currently operates eight clubs in key European cities across Belgium, Germany and Italy.

Plans for 2020

Quietly progressing on a number of opportunities throughout the year.

CEO: Brian Morris



Professional background

A reformed property development professional (chartered surveyor) who gets to do what I love doing in an industry that adds value to people's lives. Set up the Riverside and Espree health clubs with Peter Beckwith in the 1980s. Launched the first Aspria club in 2000.

Best piece of advice you've ever been given

Keep your head down and follow through.

People might be surprised to know that...

I play tennis at the oldest court in England and race historic cars across Europe.

Athletic Fitness

78 Yanko Sakuzov Blvd, 1504 Sofia, Bulgaria

Tel +359 (0)889 140 264

Email svetoslav.chankov@athletic.bg

Web www.athletic.bg

Facebook /athletic.fitness

Company profile

Athletic Fitness is one of the leading fitness operators in Bulgaria. The company was founded in 1994 by current CEO Peter Angelov and currently has nine clubs in four of Bulgaria's major cities: six in Sofia, one in Plovdiv, one in Stara Zagora and one in Burgas. In addition, the company runs Fitness Academy Bulgaria, where nationally-recognised instructor courses are taught.

Number of sites

11 clubs.

Plans for 2020

We plan to open one new club in Sofia in 2020.

CEO: Peter Angelov



Professional background

My first experience of the fitness industry was in Scandinavia, where I saw the opportunity for developing this business in my home country. I founded Athletic Fitness in Bulgaria in 1993 and then Bulgarian Health and Fitness Association, also Fitness Academy, the first to gain a national and European licence in Bulgaria.

Best piece of advice you've ever been given

Take care of your staff and they will take care of you.

People might be surprised to know that...

I have a Physics degree and was a DJ for some time.

Aura Leisure

**Unit H, Mount Pleasant Business Park,
Mount Pleasant Avenue, Ranelagh, Dublin 6, Ireland**

Tel +35 31 497 8988

Email information@auragroup.ie

Web www.auraleisure.ie

Company profile

Aura Leisure is a multi award-winning, Irish-owned company. It's part of the Aura Holohan Group, which has been working in the industry for over 30 years and operates the Anytime Fitness franchise in Ireland and DKIT Sport. Aura's mission is to improve the health and wellbeing of our communities through exercise, sport and active lifestyles.

Number of sites

11 public leisure facilities and 4 private fitness clubs.

Plans for 2020

Expanding with new clubs across Ireland and developing new courses as part of our Aura Fitness Academy.

Executive Chair: Gar Holohan



Professional background

Having established Ireland's most successful specialist sports architectural firm, I set up the Aura Group with Diane Vesey in 1999 which now comprises four divisions: architecture, consultancy, events and facility management.

Best piece of advice you've ever been given

What people say isn't always what you think they mean!

People might be surprised to know that...

I'm a former international squash player.

Basic-Fit

Wegalaan 60, 2131 JC Hoofddorp, the Netherlands

Tel +31 23 8901750

Web www.basic-fit.com / www.corporate.basic-fit.com

Company profile

With over two million members and more than 4,000 employees, Basic-Fit is the European market leader in the 'value-for-money' fitness market and is active in some of Europe's most attractive markets: the Netherlands, Belgium, Luxembourg, France and Spain. We operate a straightforward membership model: uncomplicated and effective fitness experiences that are easy to access.

Number of sites

More than 750 clubs, 2.1 million members, and.

Plans for 2020

Basic-Fit aims to make fitness available for all and will continue to achieve its mission.

CEO: Rene Moos



Professional background

As a former professional tennis player I opened my first fitness club in 1984, co-founding premium health and fitness club operator HealthCity in the same year and becoming CEO. In 2010, HealthCity acquired 32 Basic-Fit clubs. I decided to separate the two in 2013 and have expanded the Basic-Fit club portfolio from 32 clubs to 750 by 2019.

Best piece of advice you've ever been given

Be focused and keep improving your product.

People might be surprised to know that...

I was a tennis teacher for many years.

DiR

Gestora Clubs DiR, SL. Industria 90, entresuelo, 08025 Barcelona, Spain

Tel +34 93 450 48 18

Facebook /ClubsDiR

Twitter @ClubsDiR

Instagram @ClubsDiR

Web www.dir.cat

Company profile

DiR's mission is to improve the lives of the local population through fitness, with a focus on on-going innovation. CEO Ramon Canela is the main shareholder, with other minority shareholders including many club members.

Number of sites

DiR operates 24 clubs, plus 42 franchises.

CEO: Ramón Canela



Professional background

I worked in my family business before studying business & commerce, opening Sport Met in 1979. DiR evolved from this: a pioneer in bringing the modern gym concept to Barcelona. In 2002 I was named best entrepreneur of Catalonia and in 2006 I received the IHRSA award for Best European Club Operator of the year.

Best piece of advice you've ever been given

Solve problems when they're small, not when they're big.

People might be surprised to know that...

I am able to react to circumstances and changes in society.

Donna's Frauenfitness

**Johann Philipp Reis Strasse 11b,
53332 Bornheim, Germany**
Email noll@donnas.de
Web www.donnas.de

Company profile

Donna's Frauenfitness is a regional, women-only fitness group. The first club was founded in 1998 by owners Daniela Hahn and Günter Noll, who still own and run the clubs today. Gym sizes vary from 1,000–1,700sq m and focus on core competences in women's fitness programmes including strength training, cardiovascular, vibration programmes and group fitness.

Number of sites

Seven clubs in and around the city of Bonn.

Plans for 2020

Creating 2-3 fully digitised women-only boutique clubs.

CEO: Günter Noll



Professional background

Various roles in the fitness industry, from a legally authorised expert writing reports and carrying out inspections, to working as a university lecturer and management consultant. I'm also the German delegate on the new EU commission, developing European certification standards for health clubs.

Best piece of advice you've ever been given

Be careful – you always meet people twice in your life. Respecting others will take you a long way.

People might be surprised to know that...

I pay membership fees despite owning several clubs.

ELEMENTS

Valentin-Linhof-Str. 8, 81829 Munich, Germany
Email info@elements.com
Web www.elements.com

Company profile

ELEMENTS stands for a first-class fitness and wellness concept in a unique atmosphere. Guests and members receive a structured work-out programme and can exercise independently, in groups or together with a personal trainer. Afterwards, the spa area offers relaxing and exclusive wellness experiences, such as massages.

Number of sites

Seven: three in Munich, three in Frankfurt, one in Stuttgart.

Plans for 2020

On the lookout for new locations in Germany and to integrate new and interesting courses in our programme.

COO: Sandra Geiselhardt



Professional background

After law studies and working for notary offices, real estate companies and a publishing group, I became responsible for the back office at ELEMENTS. After coordinating the unit's HR, marketing, customer service and controlling, I took the next step and became COO.

Best piece of advice you've ever been given

Treat others as you would like to be treated yourself.

People might be surprised to know that...

I took first place at the Wake Park World Championship (Amateur Female) in Antalya in 2010.

EVO (operated by Fitness Group Nordic AS)

Karenslyst Alle 2, 0278 Oslo, Norway

Email morten.hellevang@fitnessgroup.no

Web www.evo.no

Company profile

EVO Fitness operates 450–500sq m premium PT and boutique clubs equipped by Technogym and Precor. The use of technology is extensive to enhance operational efficiency, as well as to drive the digital customer experience. The company's leading vision is to become a fitness facilitator – more than just a fitness facility.

Number of sites

Fitness Group Nordic operates 40 clubs in Norway. We also have 5 clubs in Germany, 1 in Austria and 10 in Switzerland as part of a franchise deal with Holmes Place.

Plans for 2020

We plan to open five more clubs within the next year.

CEO: Morten Hellevang



Professional background

CEO of Fitness Group Nordic since December 2013. Started in Fitness Group Nordic as CFO in 2010. Previous experience from the telecommunications, IT and FMCG sectors, mainly as CFO. I have a degree in business administration and psychology.

Best piece of advice you've ever been given

Success if not final. Failure is not fatal. It is the courage to continue that counts.

People might be surprised to know that...

I once considered a career as a trombonist.

FITLane Fitness Centers

201-204 Avenue Francis Tonner, Cannes

La Bocca, 06150 Alpes Maritime, France

Tel +33 (0)49 390 9649

Email info@fitlane.com / peter@fitlane.com

Web www.fitlane.com

Facebook /fitlane

Company profile

With more than 30,000 members, FITLANE is the largest chain of fitness clubs on the French Riviera. Founded in 2004, FITLANE brings together 23 fitness centres in the Alpes Maritimes and Var. For more than 14 years, FITLANE sports halls have pursued the same goal: to offer quality, friendly and affordable fitness rooms to the Riviera. We have always placed the satisfaction of our members at the centre of our concerns.

Number of sites

More than 20 fitness centres.

Plans for 2020

To continue to adapt to the needs of all our members.

Director: Franck Boulord



Professional background

Franck Boulord has held the post of director of FITLane Fitness Centers since July 2019. Prior to taking this role, he held the post of manager.

Fitness World

Egegårdsvej 59-61, 2610 Rødovre, Denmark

Email Info@fitnessworld.dk

Web www.fitnessworld.dk

Company profile

At Fitness World, we create healthy habits. Denmark's largest fitness chain with 600,000 members across all brands offers best-in-class value for money. As the market price leader we take great pride in optimal equipment, centre configuration, cleanliness, in-demand studio classes and a welcoming atmosphere. Helping more than 12 per cent of the Danish population live active lives.

Number of sites

238 across Fitness World, Urban Gym and Basefit.

Plans for 2020

To strengthen our footprint in Denmark, Poland and Switzerland.

CEO: Steen Albrechtslund



Professional background

Previous roles include commercial director of Carlsberg Breweries, CEO Skagen Designs, SVP global manufacturing and APAC commercial, Fossil Inc. I will further fuel Fitness World's growth in new markets as well as build on its market-leading position in the Danish market.

Best piece of advice you've ever been given

Create the box before you think out of it.

People might be surprised to know that...

I love thinking out of the box.

Genae Fitness Club

332 avenue du Général de Gaulle, 69500 Bron, France

Email anthony.barquisseau@genaefitness.com

Web www.genaefitness.com

Company profile

Genairgy network – a specialist in sports, travel, media, leisure and restaurants. Our mission is to make high quality fitness accessible to everyone. Our company is definitively orientated in providing a quality service, with our team being our best asset. We offer fitness, conditioning, dance and martial arts for everyone aged from 2.5 years and upwards.

Number of sites

Three Genae clubs and one school.

Plans for 2020

Innovation implementation in our existing clubs plus a new business concept based on group exercise.

CEO: Anthony Barquisseau



Professional background

I helped create sports concepts for Oxylane-Decathlon for 10 years (My Sporteezy, Domyos Club and so on) and now run Genae Fitness Club to develop the concept.

Best piece of advice you've ever been given

You see things and you say, 'Why?', but I dream things that never were and say, 'Why not?' (George Bernard Shaw)

People might be surprised to know that...

I aim to help as many people as possible to play sports. I also played basketball at a national level for 25 years.

High Five Health Promotion

Schinkeldijkje 18, 1432 CE, Aalsmeer, the Netherlands

Tel +31 20 4261222

Web www.highfive.fit

Company profile

High Five is a professional and reliable partner in corporate fitness, vitality and sustainable employability. We have specific knowledge of corporate wellness services, behavioural change programmes and bespoke health and fitness programmes. Healthy lifestyles empower people to work and live well.

Number of sites

50 across the Netherlands, UK, Germany and Belgium, plus a network of 1,500 clubs in the Netherlands.

Plans for 2020

Strengthening our foothold in the UK, and achieve growth of sites and health programmes in Europe.

CEO: Eric Boer



Professional background

Started career as a male nurse, before becoming an HR Director in the finance sector and management consultancy many years later. Made COO at High Five in February 2017 before becoming CEO in January 2018.

Best piece of advice you've ever been given

You are in the driver's seat of your own development and career.

People might be surprised to know that...

I'm a marathon runner! It's important to be an active volunteer alongside your day job.

Holmes Place Group

Holmes Place Brands B.V., 38-40 Leidsegracht, Amsterdam, the Netherlands

Tel +31 20 52 13 040

Web www.holmesplace.com

Company profile

Holmes Place is the leading premium health club chain in Europe and Israel. The 95 club portfolio is made up of fully owned as well as licensed businesses, all providing health and wellness services. Leveraging its platforms and expertise in the premium sector, in recent years, Holmes Place has partnered with "TRIB3" in the boutique segment, "EVO" in the convenience segment and launched "ICON" as its own premium low cost format.

Number of sites

95 Holmes Place, 16 EVO, 25 ICON, 8 TRIB3

Plans for 2020

Expanding the boutique studio TRIB3 and M&As.

Group CEO: Jonathan Fisher



Professional background

Jonathan entered the health and fitness sector in 1997, establishing a franchise of the Holmes Place concept in Israel and expanding Holmes Place into 4 other European countries. Appointed CEO of the Holmes Place Group in 2007, he co-founded EVO Europe in 2015, founded ICON in 2016 and assumed the role of chair of TRIB3 International in 2019.

Best piece of advice you've ever been given

Treat success and failure in a similar way.

People might be surprised to know that...

I meditate twice daily.

Just Fit

Ernst-Heinrich-Geist-Str. 3-5, 50226 Frechen, Germany

Tel +49 (0)2234 933450

Email info@justfit-clubs.de

Web www.justfit-clubs.de

Company profile

Founded in 2002, Just Fit is the largest fitness club chain in North-Rhine Westphalia and offers first-class service and personal fitness support to some 60,000 members. Its 23 fitness clubs, including one high-end fitness clubs in Cologne, offer fitness and wellness, and feature unique characteristics with their location at the sites of former factories.

Number of sites

23 clubs in North-Rhine Westphalia, Germany.

Plans for 2020

Opening two new clubs and consolidate our market position.

CEO: Frank Böhme



Professional background

With a career spanning more than 30 years, I founded my first fitness club in Cologne, Germany, in 1984.

My comprehensive experience in the industry has been recognised with my selection to Germany's Senate of Economy.

Best piece of advice you've ever been given

Input from staff is essential in the fitness industry.

People might be surprised to know that...

I love to work with members of my family.

Lemon gym / Impuls

Antakalnio 37, Vilnius, Lithuania

Email vidmantas@lemongym.lt

Web www.lemongym.lt / www.impuls.lt

Facebook /Lemon gym LT /Impuls

Instagram /Lemon gym LT /impulslt

Company profile

Lemon gym is the leading low-cost operator in the Baltics operating modern gyms of 1,200-1,600sq m. Roll-over of live group exercise classes is taking place in 2020. The company also operates full-service Impuls clubs of average 2,500sq m size in the same region.

Number of sites

30 with over 63,000 members in Lithuania, Latvia and Estonia.

Plans for 2020

Further growth in the low-cost segment, introducing more services and reaching a total of 66,000 members.

CEO: Vidmantas Šiugždinis



Professional background

I joined the Lithuanian company in 2012, when it was acquired by private equity fund Baltcap. Since then we have expanded in the Baltics, launching the first budget club concept in the region, created fitness club association and introduced certified training provider. Prior to this, I worked for nine years in the entertainment sector.

Best piece of advice you've ever been given

Everything is possible and it depends on you.

People might be surprised to know that...

As CEO I joined EREPS as a certified fitness instructor.

LadyLine and EasyFit (Ab LL International Oy - LLI)

Ab LL International Oy (LLI), Sulvantie 218,
65450 Sulva, Finland

Tel +358 (0)40 586 9060
Email jyrki@lli.fi
Web www.lli.fi / www.ladyline.fi / www.easyfit.fi

Company profile

LLI is responsible for operating and running two different Finnish franchising chains called LadyLine and EasyFit. The first female-only, full-service LadyLine club was established 20 years ago and is currently the largest female-only chain in the Nordic area with some 18,000 customers. EasyFit chain was established in 2010, operating a low-cost model for its 45,000 members.

Number of sites

15 LadyLine sites; 36 EasyFit sites.

Plans for 2020

To invest digital and tech solutions. Both chains will have a special focus on virtual services. EasyFit to open 2-4 sites.

CEO: Jyrki Hannula



Professional background

CEO of LLI since October 2010, previously MD for Technogym distributor Qicraft in Finland and Estonia, after spending over 20 years in different managing director and general manager positions in Finland and Europe in the fast-moving premium brands and ICT businesses.

Best piece of advice you've ever been given

Live the moment! Also tomorrow!

People might be surprised to know that...

I was (very) briefly in the modelling business...

Metropolitan Sport Club & Spa

C/Galileo 186, 08028 Barcelona, Spain

Tel +34 93 330 38 10
Web www.clubmetropolitan.net

Company profile

Metropolitan Club began in Barcelona in 1989, with a philosophy that remains to this day: sophisticated clubs providing high-quality services to clients at competitive prices. The Club has 22 fitness centres across Spain and 1 in Nice; its first international opening since the end of 2019. Its hallmarks are top-quality designs, areas devoted to relaxation and health, and high-quality service.

Number of sites

22 sports club and spa centres in Spain and 1 in Nice.

Plans for 2020

To open a club in Bogota, Colombia, and more clubs in big cities in Europe so that we have over 30 centres.

CEO: Javier Pellón



Professional background

A Bachelor of Law and an MBA from the IE (Madrid) and London Business School (UK). Founder and president of BSR in 1985, and founder and president of Llefisa in 1987, before becoming founder and chief executive of Metropolitan Spain in 1989.

Best piece of advice you've ever been given

Act. Don't be afraid to make mistakes.

People might be surprised to know that...

I've been a national champion in squash for three consecutive years.

Mrs.Sporty

Helmholtzstr. 2-9, 10587 Berlin, Germany

Web www.mrssporty.de

Company profile

Mrs.Sporty is a franchise operating smaller community located health and fitness clubs for women of all ages and fitness levels. This unique and women centered solution for health, fitness, nutrition and regeneration has revolutionised fitness and nutritional coaching. It's club business is assisted by technologies such as Pixformance.

Number of sites

450 clubs in 8 countries.

Plans for 2020

Opening new franchise-owned and operated clubs in white spots in our existing markets. Combining hyper-personalised workouts with group training at our clubs.

CEO: Niclas Bönström



Professional background

Niclas worked at Coca-Cola Sweden, SATS Europe and 24 Hour Fitness, before becoming the CEO & co-founder of Mrs. Sporty. In Germany and Austria, Mrs:Sporty is the market leader in its segment.

The company strives towards extending that market leadership in Germany and Austria while extending its presence to become the market leader in all markets where it is present.

Best piece of advice you've ever been given

Good things don't grow by themselves.

Prime Time Fitness

Prime Time Fitness GmbH, WestendDuo,
Bockenheimer Landstr. 24, 60323 Frankfurt, Germany

Tel +49 69 7158 995 111

Web www.primetime-fitness.de

Company profile

Founded in 2010, Prime Time Fitness is a group of eight training centres and an in-house corporate training facility. The clubs focus on training services, especially individual and small group personal training. All members receive introductory and on-going assessment with the Inbody BCA. Prime Time Fitness is responsible for the athletic training of two professional soccer teams and an ice hockey team. In addition, the company operates a corporate in-house training facility.

Number of sites

Ten: six in Frankfurt, three in Munich, one in Hamburg.

Plans for 2020

Steady organic growth, one to two new clubs each year.

MD: Henrik Gockel



Professional background

Starting as a consultant in the fitness industry in 1990, I then operated a small chain of health clubs in Switzerland and Germany in 1999. Between 2003 and 2008, I served as Operations Director for Fitness First Europe and later as MD for Germany. In 2010, I developed the Prime Time Fitness concept, opening the first club in October 2010.

Best piece of advice you've ever been given

Never stop learning: every day, every second.

People might be surprised to know that...

We're IHRSA European Club Leadership Award winners.

REPEAT

Borups Allé 45, 2200 Copenhagen N, Denmark

Email info@repeat.dk

Web www.repeat.dk

Facebook /repeatfitness.dk

Instagram /repeatfitnessdk

Company profile

Founded by fitness entrepreneur Hans-Henrik Moe Sørensen and IHRSA Chairman, Rasmus Ingerslev, Repeat is a targeted health club concept, created with a specific group of people in mind: 20-40 year olds. Set in a cool, Soho-esque environment with dimmed lighting and loud DJ music, flexibility in pricing and terms is key. A smooth digital extension of the in-club offering provides a stress-free end-user experience.

Number of sites

Six clubs in Denmark and Sweden.

Plans for 2020

To open new clubs in Scandinavia.

CEO: Hans-Henrik Moe Sørensen



Professional background

Project manager at the Danish Foreign Ministry's commercial Trade Commissions; Regional Manager at Fitnessdk, co-founder, partner and COO at Fresh Fitness Denmark. Co-founded Repeat in 2016 with Rasmus Ingerslev and two key colleagues from Fresh Fitness.

Best piece of advice you've ever been given

Embrace new challenges as they will inevitably develop you as a leader and a human being.

People might be surprised to know that...

I'm an expert builder of shelters... in the eyes of my kids.

SATS Group

PO Box 4949 Nydalen, N-0423 Oslo, Norway

Tel +47 23 30 70 00

Web www.healthandfitnessnordic.com

Company profile

SATS Group is the leading provider of fitness and training services in the Nordics. Through our vision, "We make people Healthier and Happier", we play an important role in the health and quality of life of our 700,000 members and wider society. SATS Group consists of SATS, ELIXIA, Fresh Fitness, HiYoga and Balance. SATS Group has 250 centres and 10,000 employees.

Number of sites

250 in Norway, Sweden, Finland and Denmark.

Plans for 2020

Build strong clusters where our members can train at convenience; where they live, work and their friends live.

CEO: Sondre Gravir



Professional background

I joined as CEO in October 2018 after being a member for 21 years and strongly believe in our vision of making people healthier and happier. Previously, I headed up Barcelona-based Schibsted's online marketplace business, globally spanning across 19 countries.

Best piece of advice you've ever been given

To handle yourself use your head. To handle others, use your heart.

People might be surprised to know that...

I actually love GX classes...

Strata Holding

Mytnaya ul 30-1-50, Moscow, Russia

Email info@strata.ru

Web www.strata.ru
www.orangeFIT.ru
www.cityfit.ru
www.fitspacestudio.com

Company profile

Strata Holding is a leading fitness operator in Russia, operating under distinct brands: OrangeFitness, offering premium services, mass market CityFitness brand in Russia, and boutique FitSpaceStudio in the USA. Strata Holding is owned by the company founders.

Number of sites

36 clubs in Russia, Armenia and Bulgaria – 20 operating under OrangeFitness and 14 operating under the CityFitness brand. Three FITSPACE studios in the USA.

Plans for 2020

Opening 2 OrangeFitness clubs in Russia and franchise development of FITSPACE Boutique Fitness in the USA.

President: Anastasia Yusina



Professional background

Before founding Strata Partners in 2001, I gained marketing experience in senior positions with big multinationals. I have a PhD in economics and am a trained journalist. Joint winner of the 2011 IHRSA European Club Leadership Award.

Best piece of advice you've ever been given

You are responsible for your life, your relationships and your future. All good and bad things that happen around you are initiated by yourself.

People might be surprised to know that...

In November 2016 I became an IHRSA board member.

Urban Gym Group

Johan Huizingalaan 763a, 1066 VH Amsterdam, the Netherlands

Web www.trainmore.nl
www.clubsportive.nl
www.highstudios.com

Company profile

Urban Gym Group comprises three fitness concepts: TrainMore, ClubSportive and High Studios. Fitness chain TrainMore encourages everyone to exercise more regularly by rewarding every workout with a €1 discount. ClubSportive is a high-end premium gym in Amsterdam's biggest business district. The High Studios boutique concept focuses on high-intensity workouts only.

Number of sites

14 TrainMore, 1 ClubSportive, 3 High Studios.

Plans for 2020

7 TrainMore sites, 2 High Studios and 1 ClubSportive. Launching a new boutique boxing concept.

CEO: Han Doorenbosch



Professional background

I started out as a PE teacher, but found my passion in fitness. In 1996 I opened my first ClubSportive. I finished an MBA in 2010 and founded TrainMore in 2011. In 2015, I co-founded High Studios, the first boutique fitness club in the Netherlands. I'm a member of REX.

Best piece of advice you've ever been given

If you always do what you've done, you'll always get what you've had.

People might be surprised to know that...

Despite all my clubs, I also really enjoy to train outside.

Vivafit & Personal20

Rua Elias Garcia 324 Loja D, E&F,
2720-335 Amadora, Portugal

Tel +35 1 210 970 651

Web www.vivafit.eu, personal20.com, p20method.com

Facebook VivafitInternational / Personal20

LinkedIn Vivafit / Personal20

Twitter Vivafit / Personal20

Instagram vivafit

Company profile

Co-founders Pedro and Constance Ruiz operate and run two fitness franchise concepts: Vivafit and Personal20. Vivafit is a women-only boutique fitness concept with its own exclusive programmes: SBARre and HIIT. Personal20 is an Electro Fitness studio concept operating within fitness facilities and as standalone studios focused on EMS.

Number of sites

25 Vivafit and 14 Personal20.

Plans for 2020

New Vivafit sites in Spain and India, new Personal20 sites in Portugal, and Personal20 launching the P20 Method License in the USA for operators of EMS.

CEO: Pedro Ruiz
President: Constance Ruiz



Professional background

Connie has been in the fitness industry for 20+ years and Pedro has 30 years' experience in engineering, management and entrepreneurship.

Best piece of advice you've ever been given

Never forget where you came from and who helped you get where you are today.

People might be surprised to know that...

We like to see ourselves as 'global citizens', with residences both in Portugal and the USA.

VivaGym Group

Fitness Hut: Avenida D. Felix Niza Ribeiro, 7, 2 andar.
2740-314 Porto Salvo, Portugal

Web www.fitnesshut.pt

VivaGym: Pasaje Compositor Lehmeberg Ruiz,
4 2ºF 29007 Málaga, Spain

Web www.vivagym.es

Company profile

VivaGym Group is the Iberia's largest club fitness operator with 310,000 members. Its value proposition is anchored on a high-value low-cost service. The axes of such a proposition are: price leadership, long opening hours, premium location, no contract, and a wide range of classes and add-on features, like PT and nutrition; all for an affordable monthly fee.

Number of sites

90 gyms: 49 in Spain, 41 in Portugal.

Plans for 2020

VivaGym Group plans 20 openings in Iberia and the introduction of new activities like Zumba Strong and Power Cycline.

CEO: Juan del Rio Nieto



Professional background

With more than 20 years' experience with a successful professional career in the retail sector and combining executive functions with own ventures. Has worked intensively in areas of business strategy, serving as CEO at Jenó's Pizza, and Bodytech Colombia.

Best piece of advice you've ever been given

Keep things simple. It's not what you do, but how you do it.

People might be surprised to know that...

I'm a 1 handicap golfer.



The age of INDEPENDENTS

This year's line up shows a trend for innovative décor and independent operators from elite sporting backgrounds serving up fresh concepts. Kath Hudson reports...

All the cardio benefits of boxing in an accessible, fun and fear-free workout

KOBOX

This killer concept – of boxing with strength and conditioning in a nightclub-style environment – has gone down a storm in central London, with A listers like David Beckham and Cheryl Cole giving it a go.

“The whole idea of KOBOX is to introduce people to the cardio benefits of boxing, making it fun and accessible, while taking the fear factor out of an intimidating sport,” says the founder, Shane Collins. “This is not a fabricated workout. It’s a culmination of years of experience as a coach and is based on my desire to bring a genuine boxing workout to the mainstream.”

A former coach to elite athletes, who started out at Barry’s Bootcamp, Collins was introduced to the world of boxing via a serendipitous meeting with a boxer at home in Dublin.

“I fell in love with the sport, and all my work started to revolve around training fighters for competition,” he says.

“I wanted to take the sport into the mainstream, because the benefits are so good – hitting a punch bag is good stress relief, and each move targets the entire body. But, if you’re a non-boxer, there is nowhere for you to get access to the sport. Like me, most people are scared to go to a boxing club.”

Collins decided to trial his hunch with a pop-up club on Kings Road in central London in 2015. The environment was dark and atmospheric, with loud music, and the 50-minute workout was half boxing and half strength and conditioning.

“Because it hadn’t been done before, I couldn’t get an investor and people said we were mad to open a boxing gym, especially on Kings Road,” he says. “But we did it anyway and were busy from the get go.”

This success led to a second site being launched at Liverpool Street in 2017, followed by a third club in 2019 at Baker Street. Last year, the pop-up Kings Road club also moved to a permanent home and is the first KOBOX site to include a limited capacity gym circuit, supplied by the Physical Company.

Prices are in line with London boutiques: one class costs £25, with discounts for bulk buys.

Fuelled by Collins’ passion, the unique offering and celebrity interest, KOBOX has been a big hit in London. Collins is now tying up an investment deal to fund a widescale roll out by modifying the concept for secondary cities.

Adding, “I plan to do for boxing what SoulCycle has done for spinning.”



“The whole idea of KOBOX is to introduce people to the cardio benefits of boxing, making it fun and accessible”
Shane Collins, founder

▶ THE ATHLETE FACTORY

Former pro-rugby player Phil Greening has created The Athlete Factory in Chester to bring the type of training that elite athletes use to the mainstream. This functional-led gym has a results-orientated, yet inclusive, focus with 11 year olds and national rugby teams among its users.

During his professional rugby career, Greening earned 24 caps for England and played for WASPs, Gloucester and British Lions, before moving into elite level coaching. When Chester Rugby Club enlisted him to redevelop a health club beside the pitch, he jumped at the chance to bring his elite sports skills to the public, taking full control of the project that launched The Athlete Factory in 2017.

“My main goal was to share the knowledge that I had amassed from 20 years’ experience of elite sport to make our members faster, stronger and leaner,” explains Greening.

“We’re taking the methods used by top athletes and applying them to Joe Public.”

The gym has Wattbikes, Woodway treadmills and Concept rowers, a mobility circuit, turf, pulleys, tyre flips, a strongman kit, lifting platforms and bespoke free weights from M Fitness. But what sets it apart is the know-how of the team, all of whom are degree trained in strength and conditioning.

“They approach their members’ fitness goals in the same way as an elite sports coach would train their team for competition – scanning them at the outset, discussing goals, and prescribing a programme which is updated every six weeks,” says Greening.



Every member has their own coach and signs into the app to stay accountable



“ My main goal was to share the knowledge that I had amassed from 20 years’ experience of elite sport

Phil Greening, founder

“Every member has their own coach and they sign into the app to stay accountable. It’s like being part of a professional team.”

Membership rates start at £45 for gym usage only, rising to £80 for AF athlete, which incorporates the functional floor, HIIT, strongman and Wattbike classes, as

well as coaching sessions and a programme.

Going forward, Greening plans to open five or six more clubs over the next two to three years in the north of England. Manchester is the next target site, with a slightly smaller urban club run along the same lines as that in Chester.



Luxe cleverly combines affordability with style

LUXE FITNESS

Not many operators have the sporting pedigree of Allyn Condon, who has represented the UK at both the summer Olympics as a sprinter and the winter Olympics as a bobsleighter. With Luxe Fitness, his aim was to create a club which removed the barriers to exercise and offers a stylish setting at a low cost.

As well as being an elite athlete, Condon has a background in health and fitness working for major chains, but he was disenchanted with the industry and wanted to create something fresh.

“We wanted to create a unique space, which felt like a home from home, which people want to go to,” he says.

“All too often gyms are seen as places that people feel they have to go to, but don’t really want to spend their time in. We wanted to create a space which removed



“ *All too often gyms are seen as places that people feel they have to go to, but don’t really want to spend their time in*

Allyn Condon, head of operations

the intimidation factors and feels like a luxury product, while still being affordable.”

Condon found investors to back his vision and a Grade II listed building, in Bristol, to bring his dream to fruition.

Fitted out more like a coffee shop than a gym, with a soothing grey and white palette, its enormous bespoke chandelier is an iconic centrepiece while the original maple and oak floor was retained. To further remove the intimidation factor, there are no mirrors and the equipment is laid out in small zones that are seamlessly linked.

The 7,700sq ft (715sq m) site has a coffee and juice bar, six training zones, two studios

(spin and classes), functional equipment, an Exigo rig, free weights and lifting platforms. Core Health and Fitness provided most of the kit. It’s the price of the low cost chains, with no contract memberships at £19.99 a month for 24-hour access.

With a roll out planned, the team may bring in more investors, which will initially be focused in Bristol and west country cities. Condon says he’ll have a different criteria for choosing sites to most operators: “We’re looking for interesting properties, either listed buildings or quirky ones. No two sites will be the same and they will all have the wow factor.”



Class Boutique is based on a culture of movement and health

▶ CLASS BOUTIQUE FITNESS

Bath-based Class Boutique Fitness collaborated with Physical Company to create a boutique studio offering outside of the capital. Launched in February 2019, the club is as inclusive as it is effective.

“Where most boutique studios operate within a niche, we approached things from a different perspective,” says Rob Suchet, founder of Class Boutique Fitness.

“Rather than focusing on just one form of activity, we looked at what humans need to achieve the broadest range of transferable fitness – that is, fitness we can use in our everyday lives. The answer: variety in our workouts.”

As a result, Class has been designed around a culture of movement and health, offering both yoga and HIIT classes – restorative yin and dynamic yang – with healthy nutrition in its HealthBAR café.

Of the 55+ weekly classes, eight are labelled Upper Class, to denote a lower



“ *Where most boutique studios operate within a niche, we approached things from a different perspective*

Rob Suchet, founder

impact option for older adults and those new to exercise. “We don’t want anyone to feel patronised or like we’re trying to create easy workouts for them. Neither do we want them to think they can’t go into the other classes,” says Suchet.

“However, older adults can reap such huge benefits from exercise that we felt it was important to properly cater for this group. Above all, we wanted Class to be inclusive and our membership base reflects this: 30 per cent are under 40; 50 per cent are aged 40-60; 20 per cent are over 60 years old.”

The team worked with Physical Company to create the ‘Turn & Burn’ HIIT studio, supplying the Ecore Bounce 2 flooring, a

top-of-the-range product with all the functionality of impact flooring, but with a wood finish in line with the club’s premium design. “We wanted people to have all the kit they needed immediately to hand, and when I discovered the Evo bench – an inclinable bench with integrated storage – I knew I’d found the answer,” says Suchet.

In line with the boutique model, the club offers pay as you go, as well as bulk buy monthly options. A single class costs £14, while a batch of 20 is £139.

The club has started to attract early interest from investors and is considering expansion via franchise. However, for the meantime the main focus is to make sure the first studio really delivers.



Body Machine offers indoor cycling and TRX to a high standard

BODY MACHINE

West London boutique studio Body Machine is the vision of Hong Kong born, Taiwan raised and US trained architect Dr Frances Mikuriya.

As well as being the first authentic licensed TRX facility in Europe, Body Machine offers personal training, indoor cycling and a café, all within a beautifully designed and serene space.

With four architectural degrees under her belt, Mikuriya was very specific in her vision and worked with her architecture partner, Jorgen Tandberg, to achieve this. "I wanted to open a club which integrated architecture and fitness," she says.

"Instead of creating a dark, nightclubby environment – which has become the industry blueprint – I wanted to create a light, airy space which flows seamlessly and has areas for members to socialise. Many of my members are my former clients and know each other well.

"Secondly, I wanted to just offer a couple of activities and do them very, very well.



“ I wanted to open a club which integrated architecture and fitness, instead of creating a dark, nightclubby environment

Dr Frances Mikuriya, founder and director

Lots of boutiques have spread themselves thinly offering everything, but I wanted to do indoor cycling and TRX to a high standard and for the classes to be designed to complement each other."

Despite studying and subsequently teaching architecture, Mikuriya has been in the fitness industry for more than 20 years, completing her fitness qualifications and working with private clients alongside her architectural studies and career.

Mikuriya was one of the first to offer private indoor cycling group training in the UK when she launched her own concept, SpinAddikts, out of a rented basement way back in 2004. Once she decided to take the plunge, Mikuriya funded the new project

by asking her clients to back her vision. A number of them ended up investing in Body Machine and she found a three-story, 7,400sq ft (687sq m) former Top Shop site in Kensington, central London.

"With massive windows and flooded with light, the site was exactly what I had in my head," explains Mikuriya.

The studio opened its doors early in 2019 and the prices reflect the London boutique market, with an introductory class costing £18 and a batch of 20 costing £220.

The plan is to get this site running smoothly and then look at expansion. Paris is on the wish list. "I travel there frequently and can see that the fitness industry has really taken hold there now," she says. ●

HCM

HANDBOOK 2020

FRANCHISE SECTOR

Franchise briefing p158

Franchise profile p166

Franchise briefing

Franchised fitness is growing at a phenomenal pace.

We look at what's driving this rapid growth

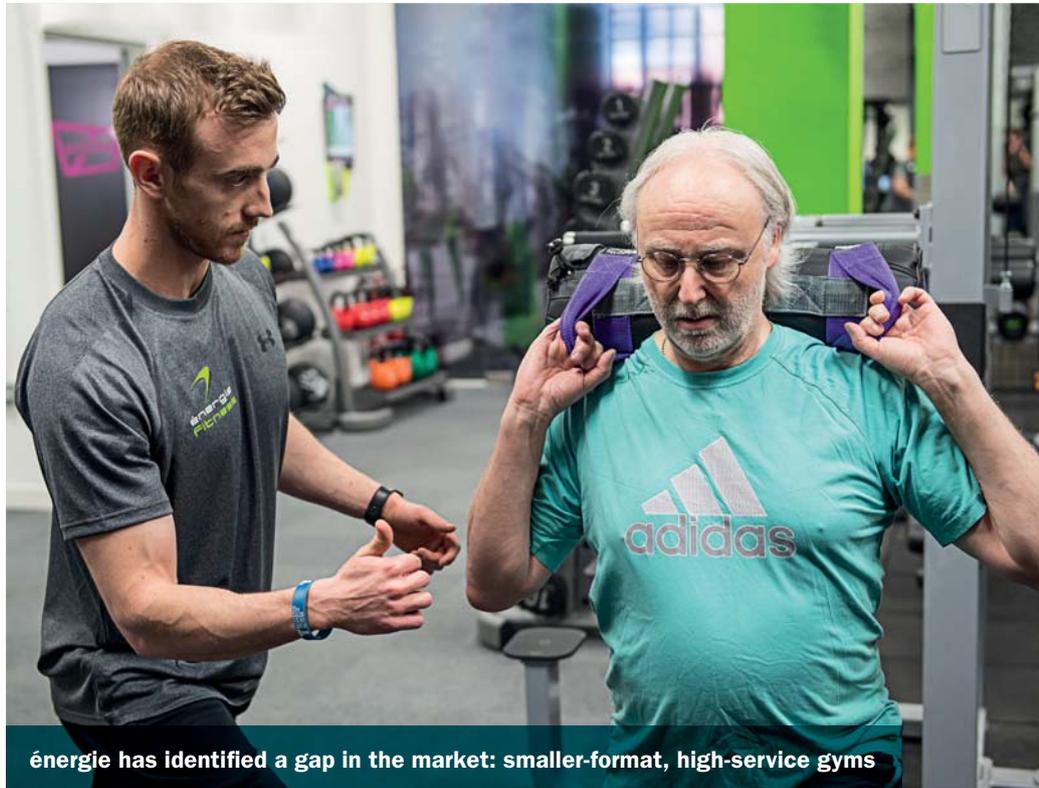
Some of the UK's largest and fastest-growing fitness brands are franchise-based. The likes of énergie, Anytime Fitness and Snap Fitness have all benefitted from a growing number of people wanting to set up their own health and fitness businesses.

The reason for the increasing popularity of franchising is obvious. For budding health and fitness entrepreneurs, securing the backing of a franchisor to help find and equip a gym – and arrange the necessary launch-marketing – is very appealing.

STAMP OF APPROVAL

The advantages of the franchised fitness model haven't gone unnoticed at the "other end" of the chain either. Investors looking to back businesses with the potential to grow at a pace have taken a real interest in fitness franchises.

In one case, this led to what was perhaps the biggest corporate deal to take place in the UK fitness sector over the past 12 months. In August 2019, private equity group Bridges Fund Management completed a deal to buy énergie Fitness. While the



énergie has identified a gap in the market: smaller-format, high-service gyms



Investors looking to back businesses with the potential to grow at a pace have taken an interest in fitness franchises



Anytime Fitness has benefited from a growing number of people wanting to set up their own fitness businesses

exact numbers weren't released, Bridges did reveal that it had acquired a majority stake for an initial consideration, with an earn-out based on énergie continuing to hit its targets for the 2019 and 2020 financial years.

It is noteworthy that Bridges has pedigree in shrewd, forward-looking fitness investments. It was a key player in introducing the low-cost gym concept to the UK in 2007, after backing John Treharne in launching The Gym Group – now a FTSE-listed business worth around

£360m. Having backed the budget concept, Bridges is now clearly putting its trust in the franchised model.

“We know this sector very well and believe énergie has identified a clear gap in the market: smaller-format, high-service gyms that can operate in areas where the large box gyms would not be able to,” Bridges CEO, Philip Newborough, says.

“This allows énergie to tap into demographics that would not otherwise have access to health and fitness facilities, driving better health outcomes for these

underserved populations. énergie has built a great team, and we're looking forward to working with them to prove this model in the UK and then potentially look at expansion opportunities overseas.”

EXPANDING THE OFFER

For many established brands, the main attraction of franchising is the growth opportunities the model offers. However, for others, franchising isn't just about growing the estate – it can also be a driver for diversification. ►

- ▶ One of these is Be Military Fit (BMF), the outdoor fitness specialist offering military-style training led by former armed forces personnel. According to BMF managing director Tommy Matthews, the company is planning to use franchising as a way of expanding its offer and further broadening its reach.

“We’ve begun to diversify beyond our bootcamp-style classes, introducing new programmes to extend the appeal of BMF,” Matthews says.

“For example, our Active programme has been designed for complete beginners, including older adults. We also have a programme called Crossrun, which is an elite-level running club programme.

He adds that the new formats come ahead of a push to franchise the concepts.

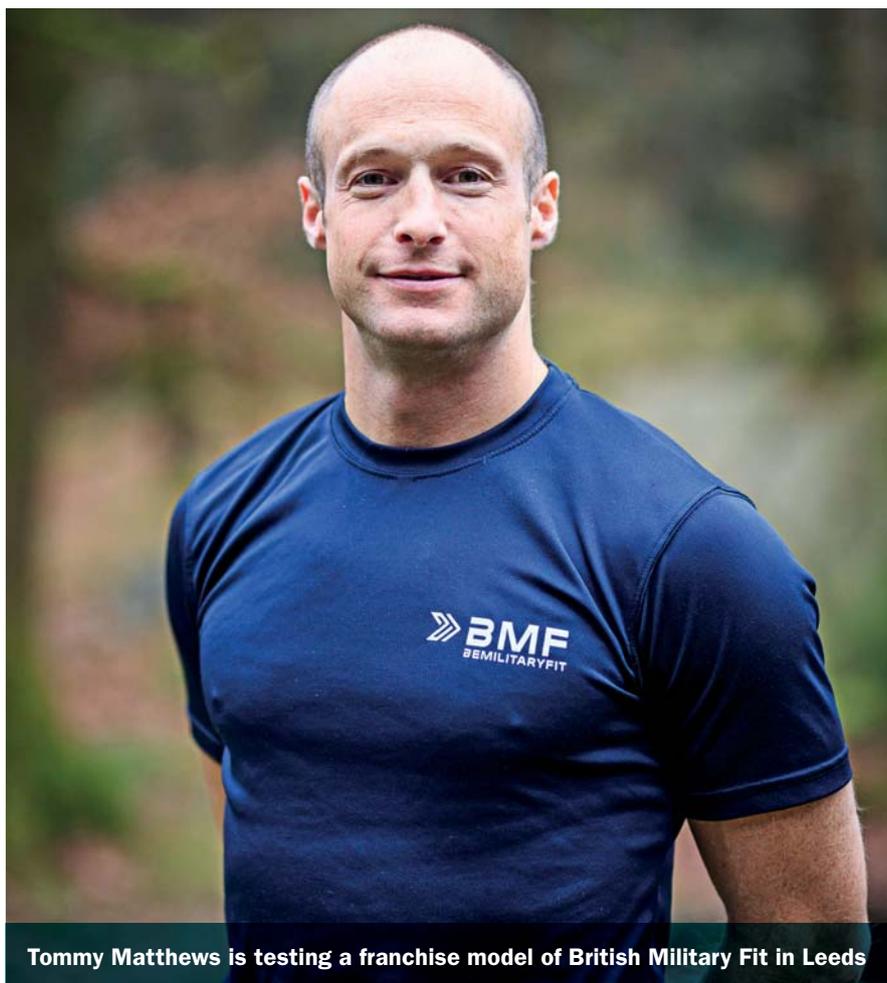
“Operations at the current 120 existing park locations are owned and operated by BMF, but we’re now moving into franchising. Traditionally, BMF has involved an instructor turning up at the park with a backpack or van full of kit – but there’s no reason to limit it to this.

“Our instant vision was to install BMF containers all over the world: shipping containers that open up for a class, with all the equipment inside that you’re going to need to create an outdoor group training studio, whether that’s on a rooftop in China or in a central London location.

“We also envisaged a third option: an indoor model that could be a standalone studio or a club-in-club concept.”

The company has now launched a pilot programme to assess how it will proceed with franchising.

“The franchise model is currently being tested inside Oxygen Freejumping in Leeds:



Tommy Matthews is testing a franchise model of British Military Fit in Leeds

it had some under-utilised space and put in a BMF studio to cater for parents while their kids were busy bouncing on the trampolines,” Matthews adds.

“We’ll test the franchise model in the UK and then roll it out internationally. Within

the UK, we’ll aim to own and operate the cities and then franchise in smaller towns and other areas; we picture a situation whereby a franchisee might take on one indoor or container site and then operate multiple parks around that same area.” ▶

“ Traditionally, BMF has involved an instructor turning up at the park with a backpack or van full of kit – but there’s no reason to limit it to this -

Tommy Matthews



BMF is diversifying beyond its bootcamp-style classes to extend its appeal

BOUTIQUE APPROACH

Franchising is also helping the booming boutique fitness sector to grow at a pace. F45 and Orangetheory are just some of the brands to successfully grow their HIIT-based training offers globally through franchising.

Australia-based F45 has grown rapidly in a number of markets around the world

and in the UK it has successfully established a presence in a number of big cities and towns – including London, Brighton, Birmingham and Reading. It is now spreading its reach in the north-west and, according to Michael Dean, F45's UK sales director, the pace is set to accelerate.

“Our goal is for there to be an F45 studio on almost every corner,” Dean says.

“With the accelerated growth we have seen since the UK launch in 2017, we are confident that we can make this happen.”

In its quest to expand, F45 has also come up with some innovative ways for securing locations. In September 2019, it signed a partnership deal with leisure centre operator Everyone Active, which resulted in the first F45-branded studio

- ▶ opening at a publicly-owned leisure centre in Maida Vale, London.

For F45, the partnership offers a way to finding new, ready-made sites with captive audiences – while for Everyone Active the deal forms part of its push to create a “boutique in a big box” model at its centres.

“We recognised some time ago that the traditional leisure centre model was not future proof and have been working hard to develop and modernise our offering,” explains Duncan Jefford, Everyone Active’s regional director.

“We are space-rich, but also recognise that it’s not always better to create your own products. The F45 product complements, rather than competes, with our own and we share the same values around getting people active. We expect Little Venice Sports Centre to be the first of many sites to house an F45 franchise.”

Elsewhere, US-based HIIT brand Orangetheory has signed two master deals for a total of 110 franchised sites covering all of England. One of the master franchisees is Wellcomm Health and Fitness, which plans to open studios across the North of England and Midlands – covering a large area stretching from Buckinghamshire to Northumberland.

“Our plan for 2020 is to open another four studios in the Midlands,” says Wellcomm co-founder and chair Mike Dixon. “We believe that, in total, we can open around 40 studios by 2025.”

FAR FROM SATURATION

As well as large HIIT chains, a number of smaller boutique brands have revealed franchising plans for the UK, including Hitio Gym, Digma Fitness, Victus Soul and TRIB3.



Orangetheory has signed two master deals for a total of 110 franchised sites

“ Our plan for 2020 is to open another four studios in the Midlands. We believe that we can open around 40 studios by 2025 - Mike Dixon

But as more brands look to franchising, is the market in danger of becoming saturated? Not at all, according to Karl Dietrich, chief development officer of boutique brand TRIB3 – the UK-based brand that now has studios in five countries.

“The franchise fitness market is still growing and is transforming how the member is looked after,” he says. “A franchisee has financial ownership of their facility, so the focus is on the whole member journey and sustained quality. It’s a very exciting sector to be in.

“Eight years ago there were only a couple of franchised gym businesses in the UK; now there are several types of facility, from low cost to premium service and from

big box to boutique across leisure as well as wellness.”

He adds that TRIB3 will be one of the companies looking to utilise all that franchising offers.

“TRIB3 has great ambitions over the next five years,” he says. “The franchising arm of TRIB3 will have the first UK franchised facility open in April 2020 and has already started to recruit further new franchisees to the brand.

“The plan is to open 10 facilities in the UK over the next 12 months, including franchisees and corporately-owned TRIB3 facilities. Recruitment across other countries will also continue, but the UK is of great importance due to it being the



TRIB3 will open its first UK franchise facility in 2020 and is recruiting further new franchisees



SWOT ANALYSIS – FRANCHISED FITNESS

Karl Dietrich, chief development officer, TRIB3

1 Strengths

Franchising is growing extremely well and therefore bringing new visibility to the sector. Service levels are transformed by the franchisee investment focus and it will continue to grow around the world. The franchisee-led fitness environment is the most exciting transformation for the industry.

2 Weaknesses

Lack of understanding from individuals outside the industry. Someone thinking of investing, who has never been involved with fitness or wellness before.

3 Opportunities

Franchising is increasingly being recognised as a safer environment for entrepreneurs, with less risk for new

individuals to start their own business.

There is also a movement within current franchise networks towards franchisees owning multi-businesses and multi-franchises. For example, an established coffee shop franchisee, who owns several stores, could be looking at diversifying into a new, non-competing franchise business such as fitness – and opening several gyms.

4 Threats

Franchisors not taking the right steps to support a franchisee seriously or correctly and missing the opportunity to create an army of brand warriors. The fitness franchise industry needs to prove to the world why this is all about people and community.

- home and heartland of the brand. The year 2020 is going to be a very exciting time for the brand.”

Isaac Buchanan, CEO of Snap Fitness – another brand that has expanded its UK presence rapidly through franchising – agrees that there is plenty of space in the sector. “The UK’s franchised fitness sector is absolutely still a growing market,” he says.

“Some brands in the market seem to be taking a more considered approach to expansion these days, which is likely due to some economic uncertainty and increased competition. However, compared to many other markets that Snap Fitness operates in, the UK is still relatively untouched and we are looking forward to a strong 2020.”

Buchanan adds that Snap – which currently has 66 UK sites and one in Ireland – is set to open between 15 and 20 sites in the UK during 2020.

The view that there is still plenty of space within franchised fitness in the UK is shared by one of the new entrants to the market, UFC Gym – the brand extension of the mixed martial arts organisation.

The UK’s first UFC Gym opened in Nottingham in October 2019 – the first of 105 clubs planned for the UK and Ireland over the next 10 years. All of the clubs will be delivered by master franchisee TD Lifestyle – a venture set up to manage the portfolio.

“We believe the future is extremely bright for fitness franchising in the UK as there is a lot of growth in this market,” says



Snap Fitness is set to open between 15 and 20 sites in the UK during 2020

Joe Long, director, TD Lifestyle. “There’s a huge interest in entering the fitness market and the timing of our entry into the UK comes when there’s focus and interest in functional training and combat sports.”

Wellcom’s Mike Dixon – who is driving the growth of Orangetheory in the Midlands and the north of UK – also sees plenty of space in the market. He does, however, suggest that things might get

tougher for smaller brands.

“For undifferentiated brands, the market will tend to saturate and make it tough to find new entrepreneurs who are willing to make the jump,” Dixon says.

“For well-funded, supported and differentiated brands, there will always be those looking to try the ‘latest thing’. For smaller brands, it might be tougher – with some even failing.” ●

“ *Some brands in the market seem to be taking a more considered approach to expansion these days, which is likely due to some economic uncertainty and increased competition - Isaac Buchanan*



F45 has grown rapidly in a number of markets around the world and has a presence in big cities and towns in the UK

THE FRANCHISEE VIEW **Michael Harley, F45 Vauxhall**

During a seven-year career in the corporate world, former British army captain Michael Harley grew tired of his job in strategic management. His military past meant that he was a fitness enthusiast, so when the time came to look for a new challenge, Harley decided that he wanted to set up his own fitness business.

He trialled a number of fitness concepts before coming across F45.

Having found interested shareholders, he began looking for sites in London and, after months of site visits and meetings, he came across an iconic railway Arch in Vauxhall. He now owns and operates F45 Vauxhall.

“Taking the plunge to set up my own studio is by far the best decision I’ve ever made,” Harley says.

“I won’t be returning to the corporate life for the foreseeable future, that’s for sure”.



FIND YOUR TRIB3

TRIB3

TRIB3 is a truly unique workout concept with community at its heart - a business at the forefront of the booming boutique fitness market. Intensive yet highly inclusive HIIT sessions, fused with a luxe, industrial studio setting. It's one workout with three elements: Treadmills, Resistance, and Intensity (TRI).

You'll need a minimum of £130k to own your own store, and TRIB3 work with several major banks who can provide financing options. Our expert support team will be by your side throughout your journey, drawing on decades of industry experience to ensure fast and high returns on your investment.

- Full turnkey service with global partnership agreements on all equipment and construction
- Established systems and proven processes
- World-class branding and marketing support
- Already active in the UK, Spain, Finland, Russia and China

TRIB3 International

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LinkedIn: www.linkedin.com/company/trib3

Web: www.trib3.co.uk/franchise

TRIB3



KEVIN YATES & JONATHAN FISHER

About us

Established in 2016, TRIB3 is a unique boutique fitness concept bringing people together through next-level workout experiences. One 45-minute HIIT session with three elements: Treadmills, Resistance and Intensity (TRI) underpinned by performance tracking technology, a custom shake bar and retail.

What is the main USP of your franchise?

Community. TRIB3 was created first and foremost to bring people together. All our stores feature a lounge area and mixology bar where you'll find our TRIB3Rs winding down after a session or attending one of our legendary TRIBAL Gatherings. The most special part of the TRIB3 experience is our bespoke journey which celebrates TRIB3Rs as they go from 'hitting the wall' on their first session to completing a huge 1,000 sessions and becoming one of our 'Legends'.

What does the franchise package include?

Franchising with us is a true partnership. Our franchise package spans finance, business planning and operations with

over 150 hours of dedicated training, as well as full property search, negotiation and design. We offer a seamless digital infrastructure alongside extensive sales, marketing and brand support.

How much does it cost?

You'll need a minimum investment of £130,000 to own your own TRIB3 and we work with several major banks who can provide financing options. The initial franchise fee is £40,000 which covers a multitude of services to get you started including property search. Once your store is open, the franchise fee is 7% including a 1% contribution for marketing.

How many sites do you have?

Eight stores operating in five countries: the UK, Spain, Finland, Russia & China.

What are your expansion plans?

Following a series A investment from Allan and Jonathan Fisher in 2019, TRIB3 has huge growth plans for 2020. Primary markets for growth are UK & Spain, however there are several new international markets also in the pipeline. We have three franchise partners opening stores in the next few months with a

target to open at least ten more stores in the UK specifically before year-end.

What consumer group / demographic is the franchise targeted at?

Our community is really diverse. We index strongly with females aged 27 to 32, which informs our property search. Our TRIB3Rs are also informed and discerning, looking for a deep, authentic connection with the brand. We are proud to offer one of the most inclusive but results-driven workouts out there.

What are the characteristics of the franchisees you're looking to work with?

Our current franchisees are amazing, entrepreneurial people with a passion to be part of a booming, exciting industry. We're proud to work with people who are looking to lead the change, be their own boss and have fun along the way.

Key personnel

Kevin Yates
CEO and co-founder
Jonathan Fisher
Chairman

HCM

HANDBOOK 2020

PRODUCTS & SERVICES

Company profiles

p170

Active IQ

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www.activeiq.co.uk



JENNY PATRICKSON

About us

Active IQ is the UK's leading awarding organisation for the physical activity sector. We lead the way with dynamic fit-for-purpose qualifications that ensure success, equipping individuals with the knowledge, skills and behaviours they need to kick-start or progress their careers in our vibrant sector.

We have over 100 qualifications, ranging from Entry Level through to Level 5, all of which are supported by eLearning, manuals and lecture packs. All our qualifications are accredited by Ofqual, Qualifications Wales and CCEA in Northern Ireland, and a wide range of programmes are recognised by CIMSPA and REPs.

In 2017, Active IQ became approved as an End-point Assessment Organisation. We offer this service for a growing number of EPA standards.

“Active IQ has an impressive rate of development, with plenty of new qualifications to keep our offering fresh and relevant. Its reputation as an awarding organisation is second to none, so we know our students will be taking qualifications that are highly regarded by employers.”

Alan Jones, Curriculum Manager for Culture, Media & Sport, Darlington College

Product range and services

Active IQ has evolved to become an awarding organisation with a difference. With a diverse portfolio of additional products and services including, the Skills Hub, Professional Career Development, Professional Recognition and most recently, End-point Assessment.

Key customers

Active IQ works with over 500 approved centres, including private training providers, colleges, employers, leisure service providers, universities, schools, prisons, young offender institutions and international centres.

Future plans

Active IQ will launch new qualifications and learning resources throughout the year, such as the Active IQ Level

3 Diploma in Supporting Clients with Long-term Conditions qualification, as well as digital learning content for online learning. We will expand our End-point Assessment service with a growing range of apprenticeship standards, and continue our efforts to support employers to make best use of their Apprenticeship Levy. Throughout the year we will continue to grow and develop our Skills Hub platform with continuing professional development content via an exciting range of interactive webinars and resources in a variety of subject areas.

Shows attending

FE Week Apprenticeship Conference, Active-net, Elevate, ukactive Active Uprising and awards, SIBEC Europe and the AoC Fitness Trainer Competition.

Key personnel

Jenny Patrickson

Managing Director

Georgie Shaw

Director of Quality and Standards

James McPherson

Commercial Director



BLK BOX

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Facebook: www.facebook.com/blkboxfitness

Blog: www.blkboxfitness.com/blogs/news



GREGORY BRADLEY

BLK BOX

About us

BLK BOX (pronounced Black Box) began as specialists in performance equipment and facility design in 2012, frustrated by the lack of imagination and invention in our industry. Our mission is simple – to improve athletes through better training and equipment. We've gone from a garage set up to doing business on a global front from our 60,000 square foot HQ in Belfast's Titanic Quarter.

BLK BOX are extremely fortunate to secure a 5-year contract with the UK's biggest gym chain Pure Gym and successfully collaborate with Gymbox across their London estate. In addition to this, we were selected to design Irish Rugby's new performance centre ahead of the Rugby World Cup 2020.

Product range and services

From Belfast Made Rigs and Racks, to renowned facility designs, our focus is on innovation and unrivaled performance. The BLK BOX product range is built for athletes by athletes, includes modular storage systems, high performance sporting equipment and strength and functional training equipment.

Future plans

BLK BOX will continue to deliver world class equipment for athletes of all levels whilst developing a range of new and innovative products from our Belfast HQ. BLK BOX also plan to host a number of educational seminars with key partners to help develop coaches and individuals within the industry.

Shows attending

FIBO, SIBEC, BodyPower, IHRSA.

Key personnel

Gregory Bradley

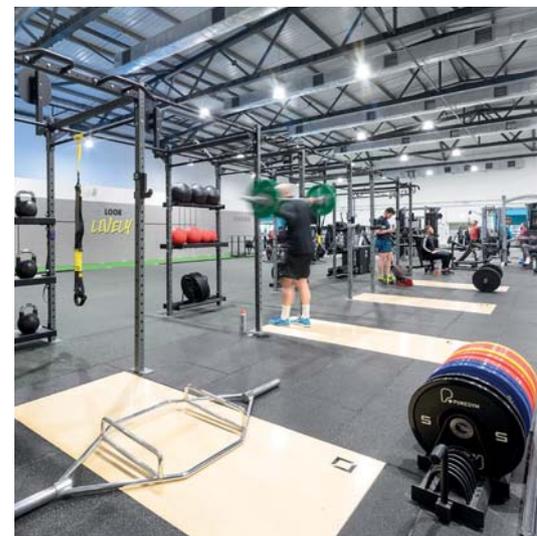
Managing Director

Miles Canning

Commercial Director

“The partnership between PureGym and BLK BOX has been nothing but positive. The BLK BOX team have been with us every step of the way, and have been a fantastic sounding board as we introduce the new Functional Training Zones across the Pure Gym chain.”

Richard Annetts, Model & Equipment Manager, PureGym





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PHIL MOSS

About us

Whether you are a low-cost gym or a 50+ multi-site multi-national health club, BrightLime manage all operational aspects in a single, flexible core solution. At BrightLime we live for tackling technical problems with a sense of fun and unashamed spark. We work directly with our customers to share ideas and know-how to create solutions and winning remedies to the problems that they face.

Product range and services

BrightLime is powerful, reliable, excellent value with no hidden costs and backed up with outstanding help desk support and customer service. BrightLime enables sales prospecting, online joining, membership administration, member portals, customer engagement, business intelligence, front desk/access

control, event management, direct debit administration and exceptional native app capability. From a single core solution BrightLime can integrate with Fitness Tracking Technologies, Payment Gateways, Access Control applications and other 3rd party solutions to improve business processes and member experiences.

Key customers

BrightLime works with a variety of leisure industry operators encompassing health clubs, spas, golf and country clubs and trampoline parks both nationally and internationally. Our customers include The Bannatyne Group, The Club Company, Sweat! and Energi.

Plans for 2020

BrightLime's progressive R&D policy produces a substantial number of new features and enhancements on a regular basis, supplied as free upgrades. Get in touch to find out more.

Key personnel

Phil Moss
General Manager

“For 15 years BrightLime has allowed us to effectively manage key parts of our business. We have successfully integrated other systems with BrightLime which has provided maximum efficiencies in our business. It is easy to implement with less worry, more productivity.”

Richard Theaker, Group IT Manager, The Club Company (UK)



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CORE HEALTH & FITNESS



TIM HAWKINS

About us

Core Health & Fitness is more than gym equipment – we offer innovative solutions for all your facility needs. Whether working with us directly or through our partners and distributors worldwide, we provide the highest quality equipment backed by a service and support team that will always go the extra mile to get you what you need, when you need it. Partner with us and see how our Core Values motivate our every decision. Visit us at www.corehealthandfitness.com

Product range and services

We offer the commercial fitness and health club marketplace an unmatched portfolio of brands including Star Trac® fitness equipment solutions, StairMaster® HIIT products, Nautilus® commercial strength products, Schwinn® indoor cycling bikes and Throwdown® for functional fitness.

Key customers

Active4Less, Coach Gyms Ltd, Coach, DW Sports, Fitness First, Holmes Place, IHG Hotels, Lifestyle Fitness, Stoke Park Country Club Spa and Hotel, Life Leisure, North Lanarkshire Leisure, TRIB3 and UFC.

Future plans

Nautilus® is celebrating its 50th year with the release of the Freedom Trainer and the repositioning of the HumanSport line. Star Trac® is continuing to advance with the radical innovation of HexDeck technology on the FreeRunner.

We are planning to launch a new Schwinn® bike along with upgrades across the entire line. StairMaster® explodes onto the scene with the I0G and OverDrive technology, which is unparalleled in the industry. Throwdown® is set to make its debut as the newest complement to our brand portfolio, creating our offering in functional training.

Shows attending

FIBO, IHRSA Europe, SIBEC, ENAS, Active-net.

Key personnel

Tim Hawkins

Global Vice President of Sales and Marketing

Peter Rigg

EMEA Key Accounts Director

James Moffatt

UK National Sales Manager

■ For more information please contact

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Email: uksales@corehandf.com

Web: www.corehandf.com

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Facebook: facebook.com/crownsportslockers

Blog: crownsportslockers.co.uk/blog

www.crownsportslockers.co.uk



SPENCER GRIMWOOD

About us

Crown Sports Lockers has designed, crafted and fitted bespoke timber furniture for spas, hotels and the sport and leisure sectors since 1993. We project manage fitouts from lockers, treatment rooms, vanities and bench seating to reception desks, bedroom furniture, washrooms and cubicles in tailored materials, colours and finishings.

Parent company

Crown Sports Lockers (UK) Ltd.

Product range

We design, manufacture and install bespoke timber furniture, including lockers, vanities, bench seating, treatment rooms, washrooms, cubicles, bedroom furniture and reception desks. We also provide a wide range of digital, electronic and traditional locking systems to suit all demands.



Key customers

Village Hotels, The Club Company, Psycle, independent hotels, spas, leisure clubs and golf clubs.

Future plans

We plan to attend two exhibitions this year: Elevate and Independent Hotel Show. We are continuing to develop our new Illuminate locker range with internal colour-changing LED lighting and translucent locker doors, which creates a relaxing changing room ambiance.

Key personnel

Richard Downing
Managing Director
Spencer Grimwood
Project Manager
Sam Palmer
Project Manager

■ For more information please contact

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Email: sales@crownsportslockers.co.uk

Web: www.crownsportslockers.co.uk

“Crown Sports Lockers’ role in refurbishing Nizels Golf & Country Club spa, poolside and gym involved them installing male, female and family changing areas under extremely tight timescales.

“This is one of The Club Company’s premium sites and our members expect continuity of service at all times. Crown’s quality of install and working flexibility, including at weekends, proved a key factor in delivering the multi-million pound project on time and on budget.”

Mark Warne, Project Manager, The Club Company



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LinkedIn: www.linkedin.com/company/debit-finance-collections-plc

www.debitfinance.co.uk



Revenue Management
Solutions



IVAN STEVENSON

About us

DFC are a leading direct debit collection company which provides cash flow solutions to happy clients from all over the UK. At the heart of our services is a mission to help you improve your relationships with your customers, so that they stay longer, and to deliver more conversion, more retention and, ultimately, more profit. Always going out of our way to deliver on our promises, you can leave us to collect your Direct Debits, while you concentrate on running – and growing – your business. That's the DFC Difference.

Parent company

Transaction Services Group.

Product range and services

We have variety of payment collection solutions, making it easy to find the right solution for your business. From online portals to comprehensive leisure management platforms for gyms and health clubs, we manage the Direct Debit process end-to-end with clear default processes in place. Transparent in our approach, we provide easily-accessible real-time reports to our clients.

Key customers

We have happy customers and work in the majority of leisure sectors, including chains, local authority, trust, budget, hotels and independent health clubs.

Future plans

DFC will continue to support our clients with innovative solutions to deliver better acquisition, higher retention and increased profit for their organisations. We are also constantly striving to create the best possible solutions for our customers' revenue management needs, and will continue this in 2020.

Shows attending

Elevate, FIBO, Active Net, SIBEC UK & Europe, Scottish Leisure Network Group, CIMSPA & Quest. We continue to support Community Leisure UK (CLUK) and are the headline sponsor for the CLUK awards. We are also supporting the ukactive 'Together We' events.

Key personnel

Ivan Stevenson

Director

Ross Young

Managing Director

■ For more information please contact

Tel: +44 (0)1908 422000 ext 826

Web: www.debitfinance.co.uk

“DFC provides everything we need to put together going forward, including Direct Debit collection from members and reporting capabilities. When combined with their flexibility and overarching sense of corporate responsibility, they are a true stand out.”

*Joe Long, Director,
UFC GYM UK*

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CHARLES BURCH

About us

EXF are British designers and manufacturers of rigs, boxing studios, performance flooring, bespoke storage and outdoor fitness equipment. We deliver premium, bespoke installations for the UK's coolest fitness spaces. We design and manufacture equipment from our UK base in Suffolk. We offer so much more than modular systems and pick-and-mix installations and don't stock 'standard' sizes, as everything is produced to a bespoke design.

Product range and services

Performance fitness flooring solutions; bespoke storage solutions; bespoke functional fitness solutions, including rigs, racks and platforms; bespoke outdoor fitness solutions; and bespoke boxing fitness solutions.

Key customers

Our work can be seen in Gymbox, Third Space, Sweat IT, Fly Kick and Ministry Of Sound Fitness to name a few. We work with a wide mix of private sector, crossfit, boutique gyms and the military.

Future plans

As well as more exciting installation projects, we will also be launching two brand new products this year.

Key personnel

Charles Burch
Managing Director
Clare Burch
Director



"Over the last few years that we have been working with EXF Fitness, they have proven to be a reliable partner and critical in helping us make our vision for each club a reality. Their equipment truly reflects the look and feel of Third Space."

Rob Beale, Director of Fitness, Third Space

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fibodo

www.fibodo.com

fit4thefight - A cross-industry campaign supporting grassroots fitness through the Covid-19 crisis

The purpose of fit4thefight is to give every UK household the opportunity to take part in personalised online fitness training, delivered by the UK's fitness professionals, to support the physical and mental wellbeing of the nation.



fit4thefight

www.fit4thefight.org

#StayInWorkOut #f4tf

fibodo Limited

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Blog: <https://www.fibodo.com/blog-page/>



JEZ WHITLING



LESLIE CLARKE

About us

fibodo is the digital solution helping people lead healthier and happier lives. From grassroots individual businesses to enterprise, fibodo simplifies organisation, management and operations, so you can spend more time on what you do best, delivering great experiences online or in person. fibodo is the fully customisable, affordable, B2B2C e-commerce SaaS platform for services. No technical knowledge required. No on-going development costs. No time delays.

Product range and services

Individual accounts: for fitness professionals, fibodo is the digital solution of choice. Coaches, trainers and instructors use our award-winning e-commerce booking system. It simplifies admin, increases sales and delivers the ultimate customer experience.

Enterprise accounts: regardless of how many sites you have, the number of instructors in your organisation or the range of services you provide, if you and your team sell time-based services and classes, we're your trusted business partner. Campaign marketplaces and Open APIs.

Key customers

Individual PTs and coaches across 50+ sports sectors. Single site gyms, studios and sports academies. Multi-site UK leisure operators. UK-based member management software platforms.

Future plans

fibodo is opening up activity finders within corporate employee benefit channels, campaign owners, as well as developing integrations with other sector leaders, adding value to all of our end-users and subscribers.

Shows attending

CIMSPA, Elevate, UKactive, Active Net.

Key personnel

Anthony Franklin

Managing Director

Jez Whitting

Head of Business Development – Fitness

Rajan Popat

Senior Business Manager

Leslie Clarke

Key Account Manager

“We wanted a straightforward, innovative way to deliver an effective booking platform for the 7HQ Gym. fibodo’s booking management solution had been recommended to us and we’re delighted to be working with the team as we build upon the success.”

Alan West, Head of Health & Wellbeing, Sodexo



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www.fisikal.com



ROB LANDER

About us

Fisikal helps fitness professionals, operators and education organisations improve efficiencies and service through its online business management solutions. The custom-built, facility management and product education platforms enable operators to manage their business online or via mobile. Functionality includes: booking and payment solutions, staff management, content delivery and business analysis. Fisikal also improves the customer experience. A mobile app provides anytime access to online bookings and an array of personalised fitness content.

Parent company

Fisikal Limited.

Product range and services

Fisikal offers five core, online business management solutions:

- Clubs – integrated software that increases profits through a reduction in operational costs and an improvement in customer engagement
- Studios – a complete business management solution, so simple it can be implemented without a physical visit from our team
- Trainers – a complete business, client management system and programme delivery solution
- Brands – software to streamline how content is delivered to commercial and consumer customers
- Academies – paperless business solutions for training providers

Key customers

Operators: Fitness First Middle East, Third Space, DIR. Manufacturers: Matrix Fitness, Escape Fitness, Academies: Drummond, Jordan, British Impact
Training Studios: Surge, Bodydesign 121.

Future plans

Continued innovation of our workout and content delivery platform to make it easier for clubs and their trainers to dynamically personalise content. Enhanced automations and integrations with third party membership systems, CRM, business intelligence and machine learning platforms.

Shows attending

Elevate and FIBO.

Key personnel

Rob Lander, CEO
Emma Excell, COO

■ For more information please contact

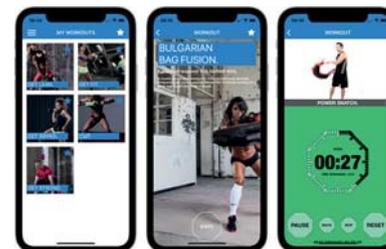
Tel: +44 (0)7720 285860

Email: info@fisikal.co.uk

Web: www.fisikal.com

“I am truly excited by the value this partnership adds to our business and to the experience we deliver to our members.”

Jordi Forms Co-Director, Fitness Clubs Dir



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Blog: <https://blog.miefitquest.com>

www.miefitquest.com



BRIAN FIRTH

About us

FitQuest (MiE Medical Research) are specialists in the field of human performance measurement. We have developed advanced measurement equipment including human Telemetry, EMG, myometry, gait, goniometry, ECG & heart rate variability, providing us with a unique understanding of human physical performance and it's measurement. Our aim is to become the number one human measurement partner by providing accurate, easy-to-use devices that enable individuals to make informed decisions about their health.

Parent company

MiE Medical Research.

Product range and services.

FitQuest brings full bio-mechanical lab technology to the fitness facility

to provide scientifically robust fitness measurement, and full body composition analysis. FitQuest provides an easy to use, intuitive system supported by comprehensive research programmes and product development, which continue to drive measurement solutions forward for the fitness industry. Our data driven analytics bring new insights to our customers, more success to our users and improved engagement for our clients.

Key customers

FitQuest works closely with operators, researchers and other organisations across the UK and internationally, including The Gym Group, Better (GLL), GOFit, medicos.AufSchalke, Elements, John Harris, Fitness One, SportPass, Quest Vitality, Fitness Park, Evolution Wellness and Action Sport among others.

Future plans

Throughout 2020, our focus is on product developments which support member engagement to provide insights to users and operators to enable exercisers to better understand how to achieve their goals.

Shows attending

FIBO Europe and Elevate.

Key personnel

Brian Firth

CEO

Neil Ballantine

COO

James Cockerill

CIO



“The latest FitQuest machines are a key part of our new LIVE IT membership, providing stand-out fitness measurement and comprehensive body composition analysis. Our members now have easy access to data that can really help them meet their fitness goals.”

Dominic Morrow, Head of Product & Proposition, The Gym Group



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LinkedIn: www.linkedin.com/company/Harlands-Group

Blog: <https://www.harlandsgroup.eu/news/>

www.harlandsgroup.eu



ROBIN KARN

About us

Harlands Group is the leading provider of membership payments to leisure, health and fitness operators. Each month we process millions of Direct Debits for our clients, but we do more than process payments. We make life easier for you by completely managing these memberships. We are a Financial Conduct Authority (FCA) authorised payment institution, so you can rest assured that your income and member data is completely secure.

Parent company

Transaction Services Group (TSG).

Product range and services

Direct Debit Collections – at the heart of company lies our transparent revenue management solution. Our flexible fully managed service takes the hassle out of collecting membership payments. With proven processes, we help you reduce defaulters and improve member retention.

Online & In-Club Joining – whether you need a complete signup solution or a custom integration into existing joining processes, our team is on hand to help. We take the paperwork out of Direct Debits.

Member Self-Serve Portal & Services

Team – members can manage bank details and catch-up with missed payments 24/7 via our online portal. Plus, our extensive Member Services team act as an extension of your business to resolve queries via email and telephone.

Dedicated Account Management – our expert team is on hand to advise you. Through our ecosystem of strategic partners, we'll help ensure you have the tools to exceed your goals.

Getting started with us is easy, with integrations into leading software to ensure seamless synchronisation with your CRM and other systems.

Key customers

Across all sectors of the industry, we work with national chains, budget gyms, franchises, local authority facilities, leisure trusts, hotels and independent gyms.

Shows attending

SIBEC UK, Active Uprising, ukactive National Summit, IHRSA European Congress and Elevate.

Key personnel

Robin Karn

Sales Director

Colin Neale

UK Sales Manager

Sarah Pearce

Head of Account Management

“Working with Harlands Group allows us to focus better on building worldclass swimming and gymnastics businesses that reach more children. Not only are we able to improve affordability with monthly payments, we've cut the amount of time and the cost of payments while reducing payment failure rates to recover income.”

Karen Mosley, Sporting House



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www.healthcheckservices.co.uk



HEALTHCHECK
SERVICES LTD



ERIC PEAKE

About us

Here at Healthcheck Services, we want to empower you, your clients & your staff to live a healthier, better life.

We take pride in being at the forefront of innovation and are constantly investing in research and development to ensure our customers are provided with the latest in weighing machine and blood pressure monitoring technology. This, in turn, will naturally lead to a healthier nation to become more engaged in their health.

Product range and services

Healthcheck Services supply and install leading health kiosks throughout the whole of the UK and also the Republic of Ireland and have been operating for over 30 years – we aim to provide an effective and efficient health solution.

Whilst we believe we have eye-catching and robust health kiosks, we very much view the kiosk as just part of the package, where the additional/wraparound services are critical to any meaningful long-term changes to health and lifestyle improvements.

Key customers

Boots the Chemist, Pure Gym, The Gym Group, Xercise4Less, JD Gyms, DW Fitness First, Sports Direct, Bannatynes, Everyone Active, 24/7 Fitness, Superdrug, Total Fitness, NHS and many more.

Future plans

We have recently launched the brand of our new innovative Corevue 360 Body Composition Kiosk. We are offering this kiosk on a sales, lease, rental or for selected sites on a profit share basis.

Shows attending

Primary Care Exhibition, Best Practice Exhibition, Pharmacy Show.

Key personnel

Eric Peake

Director, Healthcheck Services

Kevin Wood

Director, Healthcheck Services

■ For more information please contact

Tel: +44 (0)161 794 3206

Email: info@healthcheckservices.co.uk

“We installed Healthcheck Services weighing machines into hundreds of clubs and they were extremely accurate and reliable. Eric Peake was a pleasure to deal with and no matter what the challenge, he never let me down in over 20 years of business.”

Graeme Rogers, Ex Associate Director, JJB clubs Plc

bringing ideas to life

LES MILLS
THE TRIP

With a team of over 120 strong, we've been expertly integrating best-in-class audio visual, feature & effect lighting, access control, smart card and data & telecoms solutions for health & fitness operators since 1991.

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Hutchison Technologies

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MARK HUTCHISON

About us

Since 1991, Hutchison Technologies has operated with a simple vision – to empower UK & European clients to deliver exceptional experiences through creatively designed and expertly integrated technology solutions. With our seamless solutions, we elevate our client's concepts to new heights, turning ordinary places into unique spaces. We strive to push the boundaries of what's possible and set new industry benchmarks – we lead where others are content to follow.

Product range and services

Hutchison Technologies deliver end-to-end technology solutions from audio visual, feature lighting and control systems to access control, membership cards, access apps, wearable tech, and enterprise data and telecom solutions.

As well as delivering best-in-class technology, we also provide transparent and responsive aftercare service. We've also established our own innovative research and development, design, sourcing and manufacturing operations, which have led to new partnerships and innovative product developments.

USPs

For over 20 years, not a single Cold Sauna icelab -110 °C has been reported faulty for technical reasons. The Cold Sauna icelab uses unique software for telemaintenance, and a state-of-the-art product set-up assures the highest reliability.

The optional Heat Recovery System (HRS) can use all heat extracted from the icelab chamber to support the heating of your swimming pool. The payback of the initial investment for your cold sauna can be seen within the first few years, as operation costs are low. No nitrogen, liquid air or other gases are consumed.

Key customers

David Lloyd Clubs, Gymbox, Virgin Active, Nuffield Health, The Gym Group, Victus Soul, Static Fit, Urban Fitness, Village Hotels, Core Wellness Centres, GLL and Everyone Active, plus leisure trusts, local

authorities, universities and independent leisure centres and boutique studios.

Where in the world?

Worldwide; you can find some references on www.whole-body-cryotherapy.com

Future plans

2020 will see us move into a new state of the art facility, allowing us to further expand and expedite our exciting operations across the UK and Mainland Europe.

Key personnel

Bruce Hutchison, Director

Mark Hutchison, Director

Ross Paterson

Technical Sales Account Manager

Darren Milne

Technical Sales Account Manager

"The AV doesn't just look and sound amazing – it's that Hutchison Technologies really understand how behind-the-scenes functionality impacts our member experience. More engaged instructors make for happier and harder working members, which means we're happy too!"

Michelle Dand, Group Health & Fitness Manager, David Lloyd Clubs

JORDAN

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JORDAN



ZAK PITT

About us

Jordan Fitness have been at the forefront of premium gym design, with a strong reputation for high-quality functional training equipment, since it was established in 1989.

Neil Jordan, company founder and chairman, built Jordan Fitness based on a key principle; that customers and clients would receive premium quality at an affordable price. By applying innovation in design, and sourcing exceptional quality products, we deliver outstanding fitness solutions.

We have remained valued by our clients and at the forefront of the industry for over 30 years as a result.

Product range and services

From free weights to functional fitness accessories and benches, studio equipment through to combat, in addition to flooring – everything is designed and crafted to the highest standard.



For a more personalised, bespoke look and feel, you can add your logo and brand colours to our durable Urethane Dumbbells, Barbells and Discs in addition to our HIIT Bench. You can also colour your rigs and racks with our in-house powder coating service, and even design your own functional floor markings with our Activ tiles and turf.

As an education supplier, we also offer Fitness Instructor courses in Olympic Weightlifting, Indoor Cycling, MMA, Kettlebell as well as in-house training programmes.

Key customers

We are a No1 choice for several large gym chains including Pure Gym, énergie Fitness and Anytime Fitness. This is in addition to the thousands of independent gyms/boutiques, Universities and Schools, Elite Sports teams, Luxury Spas and Hotel chains as well as Personal Trainers.

Future plans

We're excited to launch our new Ignite X Pump Sets, Equipment Racks and the new ground-breaking Fusion HIIT Tower – a space-saving performance rig like nothing ever seen before.

Shows attending

FIBO, Elevate, SIBEC UK & Europe, Active Net.

Key Personnel

Zak Pitt

Managing Director

Scott Lamber

Head of Sales

Liz Hearmon

Head of Marketing

“Jordan's product innovation & quality, attention to detail and competitive pricing makes them a perfect long-term partner for our business.”

Richard Annetts, Model & Equipment Manager, PureGym

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KEISER®



ROBIN GAND & GARRY SPREADBOROUGH

About us

At Keiser, we are constantly innovating to reach the next level of human performance. We are never satisfied with the status quo. Even if it's our status quo. By beginning the design process with the human body in mind rather than the limits of current technology, Keiser develops science-backed solutions that break the traditional rules of the industry.

Product range and services

Pneumatic Resistance System –
With Keiser Pneumatic Technology, the muscles remain active and engaged throughout the entire range of motion and velocities, with reduced shock loading to muscles, connective tissues and joints, which allows for workout regimens that can safely improve physical performance in ways not seen with traditional strength-training methods.

Keiser M Series Cardio – Keiser M Series Indoor Bikes revolutionised the world of group fitness when they came on the market over two decades ago, and have set the standard for the category ever since.

The first bike to use eddy current magnetic resistance and an aluminium

flywheel, the M Series continues to offer users and owners innovations that improve the group cycling experience.

Keiser Education – With Keiser PowerED, we provide research-based educational courses from world-renowned Master and International Trainers armed with the best training tools and information to get you certified and take your classes to the next level. PowerED increases class retention, leading to greater results and boosting the bottom line for your business.

Key customers

Major health and fitness chains, independent fitness centres, elite sports teams, national governing bodies, medical facilities, educational facilities, military and home users.

Future plans

Continue to deliver world class equipment and solutions, development of our technology offering, enhanced education programmes for both M Series and Pneumatic Resistance, and outstanding service agreements.

Shows attending

IHRSA, FIBO, Sibec Europe, Sibec UK, Leaders in Performance, Elevate.

Key personnel

Robin Gand

Vice President: Europe & Africa

Garry Spreadborough

Sales Director

Ask yourself, why do I train on iron? Humans are fast. Iron is slow. In most lifts humans are weak where iron is strong, which increases the risk of injury. And humans are strong where iron is weak, which decreases results. There is a better way.

At Keiser, we are constantly innovating to reach the next level of human performance. We are never satisfied with the status quo. Even if it's our status quo. By beginning the design process with the human body in mind rather than the limits of current technology, Keiser develops science-backed solutions that break the traditional rules of the industry.



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www.Legendware.co.uk



SEAN MAGUIRE & JONATHAN COOKE

About us

Legend is your partner for integrated software, payments and services, with a system designed to streamline leisure operations. Our industry leading “One System - One Solution” software, payments and services platform, allows operators to increase member loyalty and visit frequency, through improving member experiences.

Customer-led product development produces a constant stream of innovation delivered through free upgrades, which provides customers with a competitive edge, driving sales and revenue growth.

Product range and services

Legend’s ultra-reliable cloud-based management software provides operators with the tools for success. From Access Control to Front Desk; Back Office to Online Services; CRM to KPI Reporting; Mobile Apps to Kiosks and Courses; Legend’s revolutionary software streamlines processes, reduces costs, enables business decisions, facilitates payments, improves customer service and ensures business growth. Our outstanding 24/7 help desk is a standard

feature. Legend lead the way with ISO 9001 Quality and ISO 27001 Information Security Accreditations.

Key customers

Legend looks after facilities of all sizes from small clubs and gyms, universities and schools, to major public leisure and sports complexes. We take pride in what we do and nearly 80% of new customers are referrals from current customers.

Future plans

Keep in touch for details of our new online joining feature, payments call centre, Legend Bytes, updated Active Outcomes Module, Legend Pick & Mix, and new Native App functionality.

Shows attending

The Legend team hope to see you at: Active Net, IHRSA, Ontario PRO, FIBO, Sibec UK, Elevate, Ireland Active, Legend Conference, SIBEC EU and the Legend Golf Day.

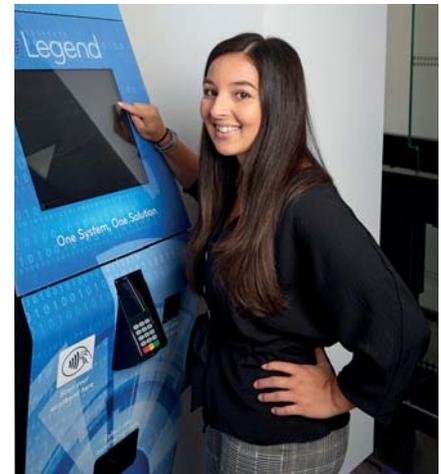
Key personnel

Sean Maguire

Managing Director

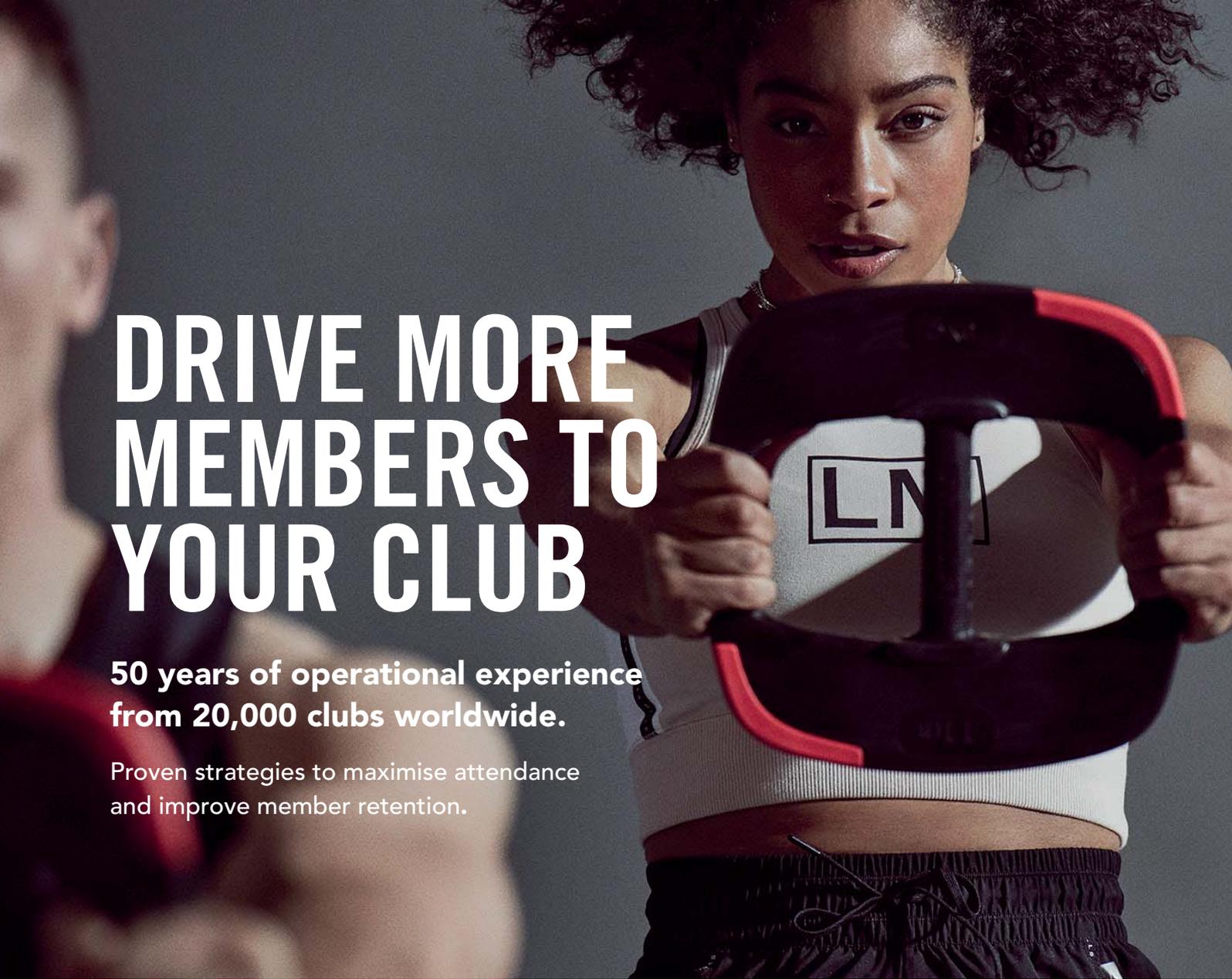
Jonathan Cooke

Customer Experience Manager



“Having worked with a number of different leisure management systems over my career, I would fully recommend the Legend system to any customer looking to change their management system. It’s been a real positive experience for us.”

*Iain Stevens, Senior Manager
Business Management and
Development, Angus Alive*



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Website: www.lesmills.com/uk

LES MILLS



MARTIN FRANKLIN

About us

For over 50 years, Les Mills has led the way in fitness programming. The global business creates 20 group fitness programmes that are refreshed quarterly.

These include BODYPUMP (most popular global barbell workout), BODYCOMBAT (martial arts), RPM (indoor cycling), BODYBALANCE (new yoga), The Trip (immersive cycling), LES MILLS GRIT (high-intensity interval training) and LES MILLS SPRINT (high-intensity interval cycling).

Every week, millions of people get fit in 20,000 clubs across 100 countries with the help of 130,000 Les Mills instructors.

A study carried out in partnership with ukactive found that members who attend Les Mills classes stay in membership on average nine months longer than those who don't.

Product range and services

Les Mills is committed to helping club partners grow healthier businesses by providing world-class experiences through group workouts that engage members inside and outside their facility.

This dedication to creating highly motivating experiences for members

begins with our commitment to training the very best instructors. Les Mills' premium group fitness programme is a live, instructor-led cycle workout called The Trip; a fully immersive experience that combines a 40-minute multi-peak cycling workout with a journey through digitally-created worlds.

This programme is also available as part of Les Mills Virtual, which provides a solution to off-peak member engagement.

Online streaming service, Les Mills On Demand, provides exercisers with round-the-clock access to programmes, allowing operators to connect with members inside and outside their facilities.

Key customers

Operators from independents, local authorities, corporate, budget to boutique.

Future plans

Supporting partners to upskill colleagues

through CIMSPA-accredited Group Fitness Management training, which offers proven strategies to maximise attendance and deliver the best member experience in eight key plays. This involves two days of modular learning – 1,000 UK partners have completed it, gaining practical tools.

Two-hour workshop sessions, available to non-partners, provide an overview of the full course in a bitesize format.

Les Mills is continuing to invest in its instructors with a commitment to training and ongoing development. This includes offering instructors a multitude of platforms to learn from, including at-home webinars to supplement our live Tribal Gathering and Quarterly Workshop events. This aims to increase accessibility to education for those who can't always attend in person.

Events attending

FIBO, SIBEC, Active-Net, IHRSA, Elevate.

"We have people travelling 20 miles to come to our Les Mills classes, there's definitely a buzz around them. We've seen an outstanding result in only two months – membership has increased by 45 per cent and counting!"

Barry Gouldsbury, Gym Owner, Inspire Fitness



 **LIFEFITNESS**
FAMILY OF BRANDS

WORKING IN
PARTNERSHIP
TO CO-CREATE
SOLUTIONS
TAILORED TO
YOUR MEMBERS



LifeFitness

**HAMMER
STRENGTH**

INDOOR  **CYCLING**

SCYBEX

Life Fitness

Queen Adelaide, Ely, Cambridgeshire, CB7 4UB, UK

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Twitter: @LifeFitnessUK

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LinkedIn: www.linkedin.com/Life-Fitness-UK

Blog: www.lifefitness.co.uk/blog



LIFE FITNESS

FAMILY OF BRANDS



DANNY OLIVER

About us

For over 50 years, Life Fitness has been dedicated to working in close collaboration with its customers to deliver tailored solutions for them and their members. Our mission is to inspire healthier lives, and our strong heritage and family of iconic brands illustrates our commitment to delivering the best products as global leaders of our industry.

Parent company

KPS Capital Partners.

Product range

The Life Fitness family of brands offers an unrivalled broad and deep product portfolio, providing customers with

access to tailored solutions they need to target every segment of the fitness market. Life Fitness offers leading-edge cardio equipment, ground-breaking group training systems and premium strength training for exercisers of all abilities, while helping facilities to evolve through an extensive product range across our brands: Life Fitness, Hammer Strength, Indoor Cycling Group (ICG) and Cybex.

Key customers

Anytime Fitness, David Lloyd Leisure, UFC Gym, Serco, Total Fitness, Third Space, Gymbox, Fusion, Williams Racing, Macdonald Hotels, DW Fitness First, Buzz Gym, Lawn Tennis Association, Parkwood Leisure, Marriott Hotels,

The All England Lawn Tennis Club, plus leisure trusts, local authorities, universities and schools, independent gyms and sports teams.

Shows attending

IHRSA, FIBO, ukactive SWEAT, and Active Uprising.

Key personnel

Danny Oliver
UK Country Manager

■ For more information please contact

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Web: www.lifefitness.co.uk

“In my very early conversations with Life Fitness it became apparent that they weren’t just equipment providers, they were solution partners and for us that was very, very important.”

Ian Twitchen, Head of Product, Total Fitness

Life Fitness

**HAMMER
STRENGTH**

**INDOOR CYCLING
GROUP**

SCYBEX

TOTAL SOLUTIONS PARTNER GET MORE WITH MATRIX

There's a reason why Matrix is one of the most trusted and recognised brands in the industry, loved by club members, club owners, trainers and service people alike. That's because when you choose Matrix, you get more than the world's finest fitness equipment. You get the industry's most robust product portfolio, connected technology solutions, facility planning, marketing support, industry-leading warranties, unmatched customer support and so much more. Most importantly, you get a partner who will be there — for your grand opening and every day after. Together, there's no detail of your business that we can't refine, reimagine or reinvent. And that includes your bottom line.

 MatrixFitnessUK

 MatrixFitnessUK

 MatrixFitnessUK

matrixfitness.co.uk

FOR MORE INFORMATION CONTACT
MATRIX ON 01782 644900.

Matrix Fitness

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Blog: www.matrixfitnessblog.co.uk



MATT PENGELLY

About us

At Matrix Fitness, our goal is to make innovative commercial fitness equipment that stands out and sets new industry standards. Matrix provides equipment to facilities in all market sectors including private health clubs, hotels, local authorities, schools, professional sports teams and the uniformed services. We also offer a comprehensive backup support service, incorporating 2D and 3D CAD designs, marketing support and competitive warranty and maintenance contracts.

Parent company

Johnson Health Tech.

Product range and services

Matrix strives to offer equipment that will captivate your members, is easy to maintain and delivers the best return on investment.

Our connected CV equipment offers the most complete solution available – from personalised promotions to prescribing personalised workouts, helping you to reach your business goals; increase retention, build engagement, enhance differentiation, maximise ROI and boost revenue. We also offer a full strength range to address the spectrum of end-user needs, from fixed resistance to plate-loaded equipment.

Key customers

PureGym, The Gym Group, SNAP, InspireAll, IHG, Accor, Marriott, Abbeycroft Leisure, Halo Leisure, East Riding of Yorkshire Council, University of Durham, University of Bath.

Future plans

Matrix will highlight a variety of new-to-market products and updated

technologies this year including the new slat-belt Performance Plus Treadmill and an all-new cardio offering coming to the UK in the second half of 2020 in an effort to make it easier for customers to find fitness solutions specific to their needs.

Key personnel

Matt Pengelly
Managing Director
Chris Brown
Sales Director
Karen Seers
Key Account Director

“Snap Fitness has been working closely with Matrix for the last 5 years, they are always willing to go the extra mile and we recognised this in 2019 awarding them exclusivity for the next two years. We see the Matrix team as an extension to our own and together we have designed and opened some amazing clubs together and I’m sure we will continue to go and open many more.”

Isaac Buchanan, Chief Executive Officer, Snap Fitness United Kingdom & Ireland



Give your club the competitive edge.

Increase revenue, strengthen member retention, attract new clients and provide new training opportunities for staff.



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Merrithew™ – Leaders in Mindful Movement™

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LinkedIn: www.linkedin.com/company/Merrithew

Instagram: www.instagram.com/MERRITHEW



leaders in mindful movement™



LINDSAY G. MERRITHEW
& MOIRA MERRITHEW

About us

Merrithew™ is the global leader in mind-body education and equipment, having trained more than 60,000 instructors and partners around the world over the last three decades. Merrithew's innovative, multidisciplinary fitness modalities include STOTT PILATES®, ZEN•GA®, Total Barre®, CORE™ Athletic Conditioning & Performance Training™, Halo® Training and Merrithew Fascial Movement.

Product range and services

Recognised as The Professional's Choice™, Merrithew's premium equipment and accessories are crafted for professional and at-home use. Our equipment is designed to be easily customisable and adjustable for every type of client.

Some of our bestselling pieces include the V2 Max Plus™ Reformer, Stability Barre™, Halo® Trainer Plus and dual-purpose Stability Barrel™. We also offer an extensive collection of Reformer accessories, exercise mats, yoga accessories, strength training and rehab tools.

Additional services

Merrithew offers certification programmes, continuing education credits and professional development workshops at more than 175 global training centres. Merrithew's thorough and comprehensive education provides instructors with practical programming options that they can immediately incorporate into any group fitness, rehab and personal training setting.

Key customers

Merrithew caters to exercise enthusiasts, fitness professionals, studio and facility owners, athletes and health care professionals.

Shows attending

FIBO (Germany), canfitpro world fitness expo (Toronto), IDEA World Convention (California), IHRSA (California). See our full events calendar at www.merrithew.com/events

Key personnel

Lindsay G. Merrithew
President & CEO

Moira Merrithew
Executive Director, Education



EMS-TRAINING A GLOBAL MOVEMENT!

mihabodytec
made in germany



**100%
COMPLIANT!**

miha bodytec meets all
requirements of
DIN Standard 33961-5
for EMS training.

miha bodytec is the leading manufacturer of Electro Muscular Stimulation (EMS) training equipment in the fitness market.

In just 20-minutes once per week, EMS training is a full body workout that can help improve muscular definition and weight loss, strength and power output and cardiovascular efficiency.

The EMS market is taking off in the UK, whether in studios, with a mobile coach or as a shop-in-shop concept in the traditional gym. With multiple independent boutiques setting up across the capital, and other providers offering EMS throughout UK counties, the market is primed and ready for EMS.

For more information on EMS training and miha bodytec, visit www.miha-bodytec.com/en
If you want to try a session yourself, get in touch: www.yourownbigthing.com

mihabodytec
made in germany



miha bodytec

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LinkedIn: MIHA BODYTEC EMS UK LTD



PHIL HORTON

About us

miha bodytec is the leading manufacturer of Electro Muscular Stimulation (EMS) equipment. Scientifically backed, EMS stimulates agonist and antagonist muscles via electrical impulses. This encourages contractions from deep muscles that individuals might otherwise struggle to target through regular training. In just 20-minute weekly workouts, EMS improves muscular definition, strength, cardiovascular efficiency and rehabilitation. EMS is a time-efficient workout for people who are results driven yet time poor.

Parent company

miha bodytec.

Product range and services

The miha bodytec II device combines innovative technology, comfortable operation and modern design in a unique

system. The miha bodytec i-body® system allows users to feel the benefits of EMS training, engaging up to 98% of muscles, compared to the usual 60% individuals would normally target through other gym workouts. The i-body clothing is designed with the user in mind, ensuring optimum comfort during exercise. Quick to put on, easy to clean and durable, the kit provides all requirements for high-frequency use.

Key customers

PTs, fitness operators, boutiques and spas.

Plans for 2020

miha bodytec is helping to grow the use of EMS Training across the UK market. PTs and independent boutiques are expanding their businesses with several new studio openings planned this year.

Key personnel

Phil Horton

Country Director UK

Helge Gützlaff

Director of International
Business Development

Jürgen Decker

Managing Director

■ For more information please contact

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EMAIL: ph@miha-bodytec.com



“We chose to work with miha bodytec as they are the leading EMS equipment distributor worldwide. Their equipment is high quality, durable and safe, providing all the requirements for high-frequency commercial use. Their innovative technology ensures our clients receive an effective and comfortable workout.”

Mark Holland, Bodystreet, Master Franchiser



WEARABLE TECH THAT INCREASES RETENTION

Myzone is a leading wearable and digital solution built for the fitness industry to increase retention. Myzone amplifies the group exercise experience and provides valuable data for clubs with built-in challenges, personal goals, gamification, and an online social community.

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myzone.org
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JONATHAN MONKS

About us

Viewed as one of the most 'relevant' of wearable technologies for the fitness industry, Myzone is an innovative physical activity monitor and club-based system that tracks heart rate, calories burned, and effort both accurately and in real time.

Group classes become encouraging communities, personal training departments become meaningful and insightful, and with challenges, personal goals, gamification and an online social community, users are motivated to sustain physical activity through a fun, engaging and inclusive platform.

Product range and services

MZ-3: The most relevant and versatile fitness tracker on the market, using Bluetooth, ANT+ and Analogue technology to provide real-time feedback on heart rate, calories and effort.

MZ-1: Uses Bluetooth technology to provide real-time feedback on heart rate, calories and effort. With no internal memory, it is best used within a Myzone Club where the data can be uploaded to your account immediately.

MZ-60: A retro, classic sports watch crafted for those committed advocates where traditional design with functionality is key for training.

MZ-Fitness Test: Shows you how much your heart rate drops in (beats) within 60 seconds after the exercise portion of the test. A higher score may be indicative of a healthier heart.

MZ-Instruct: Promotes engagement with the Myzone screen and allows the instructor to focus on form and class motivation while following a preset class designed by the club or trainer themselves.

MZ-Book: Designed for clubs to help

manage class bookings and a Myzone class setup in one place.

MZ-20 Home Scale: Designed for the consumer, the scale is digital, Bluetooth enabled, and provides seamless live data that helps people to understand their weight, body fat, muscle mass and many other features.

Key customers

David Lloyd, Bannatynes, Mobil, Oxford Brookes University, RAF, GLL, Everyone Active, Edinburgh Leisure, Fitness First, Blackpool Council.

Future plans

New offices in Germany, Singapore, South America, India.

Shows attending

All major global fitness events.

Key Personnel

Dave Wright, Founder & CEO

David Stalker, CEO- EMEA/APAC

Jonathan Monks, Director EMEA

■ For more information please contact

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Email: info@myzone.org

“We have incorporated Myzone into every new membership as we see Myzone as an integral part of our members' journey and the significant role Myzone plays in our retention strategy.”

George Flocks, COO, Fitness First, Middle East



EXPECT MORE



Octane
TRIFECTA™

Octane Fitness is a Bold Master of **More**

- More** modalities that reinvent exercise.
- More** powerful ways to move with minimal impact.
- More** workouts that drive more motivation and more results.
- More** vision and commitment to fuel your fitness center with even more innovation.

Neil Campbell
uksales@octanefitness.com
0203 463 8542
octanefitness.com



Octane
FITNESS

Octane Fitness

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NEIL CAMPBELL

About us

A global innovator of high-performance fitness equipment, Octane Fitness, a Nautilus, Inc. brand, continually reinvents exercise with more unique modalities such as the Rō rowing machine, Max Trainer, LateralX, XT-One, xRide recumbent elliptical, Zero Runner and AirdyneX.

Standout design and innovative programming deliver HIIT and progressive challenges to every level exerciser to drive more motivation and results. Committed to greater vision, continual innovation, long-lasting partnerships and superior service, Octane is a bold master of more.

Parent company

Nautilus, Inc.

Product range and services

Octane Fitness invents premium commercial cardiovascular equipment, including the all-new Octane Rō rowing machine; the Max Trainer compact, self-powered HIIT-x-trainer; the LateralX lateral trainer; the XT-One cross-trainer; the AirdyneX air bike; the xRide recumbent elliptical; and more.

Its breakthrough programming includes Workout Boosters, the Max 14 HIIT program and advanced training regimes like 30:30 Interval and MMA.

Key customers

Nuffield Health, Everyone Active, Places for People, David Lloyd Leisure, Parkwood Leisure, Serco Leisure, Freedom Leisure and Snap Fitness.

Future plans

In 2020, Octane Fitness will help meet the growing demand for CrossFit and HIIT by presenting the Octane Trifecta, a new cardio package comprised of the Rō, Max Trainer and AirdyneX.

In addition to this package, the company is promoting the redesign of the popular xR6000 seated x-trainer, now with a swivel seat option and side platforms (xR6000s).

These unique products meet the needs of different exercisers with a wide range of resistance levels, steady-state and HIIT workouts and total-body effectiveness, with optimum comfort and ease of use.

Shows attending

Active Net, Elevate, Sibec UK and Sibec Europe.

Key personnel

Neil Campbell

General Manager

John Parkes

Key Account Manager

■ For more information please contact

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Email: UKsales@octanefitness.com

“Places Leisure has added Octane Fitness products across the estate. We regard them as being both unique products and fantastic variety options from our main supplier. Whether it is the xR6000 seated x-trainers and LateralX in the main cardio areas, or the MTX Max x-trainer and AirdyneX fan bike for the HIIT trainers, Octane continues to be an obvious choice for their increased innovation and variety.”

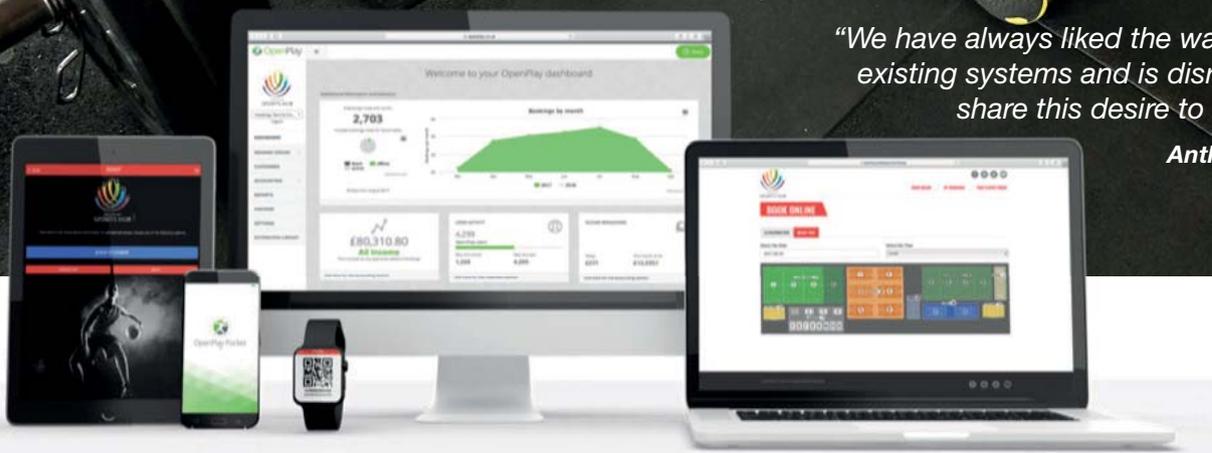
Sarah Roberts, Fitness Operations Manager, Places Leisure



A LEISURE SOLUTION REBUILT

"We have always liked the way OpenPlay challenges existing systems and is disrupting the industry; we share this desire to innovate and improve."

Anthony Currie, Head of Sport
King's College London



OpenPlay's leisure management software provides unmatched functionality to help operators create seamless experiences for both customers and staff. We work with a range of leisure institutions including:

Members Clubs | Sport & Leisure Centres | Universities | Councils

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www.openplay.net

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OpenPlay

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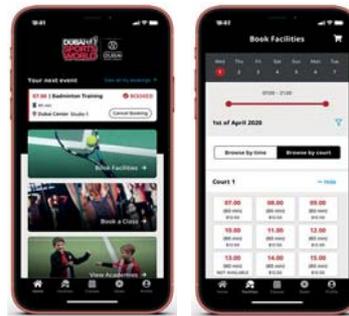
SAM PARTON

About us

OpenPlay is an award-winning sports and leisure management software company. Our mission is to transform the industry, so people all over the world can get active in their communities. Our software supports businesses globally to maximise their operational performance and deliver an unrivalled customer experience. Through our powerful technology we fix the challenges that the sector has long faced, helping it to offer greater ease, freedom and choice.

Product range and services

Operating in eight markets, OpenPlay provides a powerful, flexible and comprehensive leisure management solution. We offer everything from venue and activity bookings and mobile apps, through to full enterprise systems.



Our cloud-based software enables customers to manage and automate memberships, registrations, bookings and payments, along with customer and staff engagement.

Designed closely with the industry, OpenPlay's tools deliver indepth insights and have the ability to integrate and adapt to changing business needs, giving unprecedented flexibility and freedom.

Key customers

We work with a range of sports and leisure providers, from health clubs, leisure centres and sports clubs to universities, city bodies and local authorities. This includes top international centres like Dubai Sports World, Kings College London and Singapore Sports Hub.

Future plans

OpenPlay is going through a strong period of growth and is looking forward to debuting a new complete leisure solution, along with several other exciting new product launches in 2020.

Key personnel

Sam Parton

Chief Executive Officer and Co-Founder

Ian Pridham

Chief Technology Officer and Co-Founder

Nikhil Obhrai

Head of Business Development

"OpenPlay's system has been hugely valuable. With less administration on our end, users have a faster, smoother and more pleasant experience. The process and partnership have been incredibly professional and tailored to our requirements. We're looking forward to continuing our work together."

Anthony Currie, Head of Sport, King's College London

FIRST FOR FITNESS SOLUTIONS



PHYSICALCOMPANY.CO.UK

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JOHN HALLS

About us

Physical Company's mission statement is 'First for Fitness Solutions' – a statement that reflects the dramatic change we're witnessing in the way people choose to train. With ever larger spaces being allocated to free weights, group exercise, functional and small group training, our expertise has come to the fore: we specialise in everything today's workout spaces should be built around. Hence 'First for Fitness Solutions' – because however large or small your space, we should be your first phone call.

Product range and services

Physical Company supplies over 1,900 product lines, from commercial strength to studio equipment, functional training to mind-body, flooring to combat to cardio and far more besides – all supported with extensive training and best-in-class customer service.

Our Physical-branded range is all about good value, high quality. Complementing this is a series of partnerships with best-in-class manufacturers: the likes of BOSU, AIREX and ZIVA. We also cherry-pick innovative equipment that brings something unique to market:

Merrithew™ Pilates reformers, Ecore Athletic performance flooring and Reaxing's neuromuscular training range to name but a few.

Our approach ensures we can provide a product range to suit every budget, from price-led all the way through to premium.

Key customers

Virgin Active, Bannatyne, Anytime Fitness, Fusion Lifestyle, Village Gyms, Freedom Leisure, GLL, énergie, DW Fitness, KOBBOX, Glasgow Life, Edinburgh Leisure and many more.

Future plans

2020 sees the launch of an exciting new partnership with ZIVA. We will also continue to innovate within our product range, including integrating functional fitness with technology.



Shows attending

FIBO, ELEVATE, PAF, SIBEC EU and SIBEC UK.

Key personnel

John Halls

Managing Director

James Anderson

Director of Sales & Marketing

■ For more information please contact

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Email: sales@physicalcompany.co.uk

"It's so easy working with Physical Company; it's a one-stop shop for the majority of equipment we need. Their pricing is as good as it gets and the equipment is of the highest quality. There are lots of choices out there, but I haven't found anybody who beats the Physical Company service."

Shane Collins – Founder of KOBBOX

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Instagram: [@precoruk](https://www.instagram.com/precoruk)



STEVE CARTER

About us

For more than 35 years, Precor has driven fitness forward. We continue that heritage every day by advancing what's possible in design innovation, member experience and service. We understand the challenges fitness facilities in multiple sectors face, and our team of experts from sales and marketing to after-sales support and service will maximise your investment in fitness equipment.

Product range

Throughout our history, we've been at the vanguard of fitness innovation and award-winning CV products. We invented the cushioned treadmill, launched the Adaptive Motion Trainer (AMT) and created the world's first elliptical fitness trainer (EFX), which now features a converging CrossRamp®, continuing Precor's 'first to market' innovation trademark.

Our networked fitness offering is constantly updated, featuring an ever-expanding range of partners. Network additional spaces are offered within the gym, such as strength, through our partnership with Sony and Advagym. Also, we offer Create – an integrated

training solution that delivers a high-quality experience through Precor networked consoles – and eGym, which includes an app that enables trainers to track and prescribe cardio workouts to their clients and track activities outside the club.

Our ongoing partnership with Assault brings new dimensions to the HIIT and group exercise training solutions we can offer when combined with Queenax functional fitness training products. We continue our relationship with Spinning®, adding magnetic resistance options with the Spinner® Climb and Chrono Power; the latter of which delivers direct power measurement that requires no calibration and a batter-free console to the industry.

Our in-house engineers provide a

superior service which includes industry leading first time fix rates and guaranteed response times. All of this results in maximum equipment uptime, which is proven to increase retention.

Key customers

easyGym, Parkwood Leisure, The énergie Group, Anytime Fitness, PureGym, Hilton Hotels, Edinburgh University, University of East London, plus numerous single site operators, education facilities, local authorities and trusts

Key personnel

Steve Carter

Managing Director, Precor UK

Lauren Finnigan

Marketing Manager, Precor UK

“We opted for the 700-line treadmills for their durability and functionally and chose the higher grade P82 consoles. The mix and match option was a big part of our decision to work with Precor as it allowed us to adapt to exactly what our customers need but still maintain that premium feel. In our functional training areas we run Queenax HIIT, Stretch and Queenax Core. They meet the needs of every member, whatever their starting point – new members are coming in thick and fast just for these classes.”

Kris McIntosh, Health & Fitness Development Manager, Aberdeen Sports Village



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<https://safespacelockers.co.uk>



SAFE SPACE
THE CHANGING ROOM EXPERTS



DOMINIC HYETT

About us

Safe Space have over 25 years of experience in the UK leisure and fitness industry, offering a highly professional and reliable service. Whether you're looking to upgrade a small bank of lockers, refurbish an existing changing area or develop one from concept, we work with you to select from the vast array of locker and washroom fixtures and fittings, so that they fit your space, time frame and budget.

Product range and services

We provide a full turn-key solution for our clients from design and consultation through to bespoke manufacture and

finally installation. We also offer aftersales and servicing solutions for customers.

Our products include lockers, benching, dry and wet vanities, shower and toilet cubicles.

Locks: we supply all locking mechanisms for our clients based on their requirements and specification – latch, combination, coin return, digital and RFID technology.

Key customers

Nuffield Health, Hilton Hotels, JD Gyms, énergie Fitness, TRIB3, Digma, 3D Leisure, Lifestyle Fitness, Everyone Active, InspireAll Leisure, Runnymede Hotel & Spa and The Majestic Hotel & Spa in Harrogate.

Future plans

We continue to work on our product development to improve and widen our offering for customers. Keeping in touch with new lock technologies so we can consult accurately and effectively.

Shows attending

FIBO, Elevate, ukactive Active Uprising, ukactive National Summit.

Key personnel

Dominic Hyett, Managing Director
Gregg Rumble, Sales Director
Gary Hyett, Operations Manager
Sally Baker, Finance Manager



“Having worked with Safe Space for all of our Trib3 installations, both in the UK and throughout Europe, I would have no hesitation in recommending them. We have continually developed the locker room offers through the expansion of Trib3 and Safe Space have been invaluable in offering advice and guidance on what unique look we can achieve while keeping an eye on budget and new product developments. They are always responsive through the consultation period, and once we have agreed on a contract, they are excellent at delivering the vision on time and budget. Nothing seems too much trouble for the Safe Space team.”

Kevin Yates, CEO, TRIB3

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Marketing assets and an in-club launch pack

Special offer: Purchase a 3-year subscription with the initial bike purchase and the tablet warranty will be extended from the standard 1-year to a 3-year warranty. Tablet warranty cannot be extended after the initial purchase.

FACILITY BENEFITS

SOLO IS A GATEWAY TO GROUP CYCLING PROGRAMS

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Stages Indoor Cycling

4 Borough High Street, London Bridge, London, SE1 9QR, UK

Tel: 07920 862267

Email: uksales@stagescycling.com

Website: <https://www.stagesindoorcycling.com>

LinkedIn: <https://www.linkedin.com/company/stages-indoor-cycling/>

Facebook: <http://www.facebook.com/StagesEd>

Blog: <https://www.stagesindoorcycling.com/blog>



DAVID WILLIAMS

About us

Designed by cyclists to empower our clients to create extraordinary cycling experiences, our passion is woven into our innovative products and technologies. It's about *your* brand, not ours. Stages is the only company that offers a full suite of indoor and outdoor cycling products. We are the world's leading producer of power meters. Our products are endorsed by the most prestigious studios and best athletes around the world.

Product range and services

Stages Cycling offers a full suite of products and technologies to studios around the world. Whether your classes are rhythm based or performance driven, our SC bike range provides a safe, comfortable ride. Stages Flight engages riders through innovative, immersive group display, and empowers instructors with powerful tools for class creation. Stages Solo and the Les Mills Virtual Bike, our two bikes created for the cardio floor, act as a conduit for enticing new riders into your group classes.

Key customers

Stages Cycling is proud to partner with the most prestigious companies in the world including: David Lloyd Leisure, Places for People, Equinox, Life Time Fitness, Soul Cycle, Oxford University, Fitness First, Virgin Active and Savoy Hotels.

Future plans

Our priority is to support our club and studio customers with creative products and technologies that weather the storm of our rapidly changing exercise landscape and enable their future successes.

Shows attending

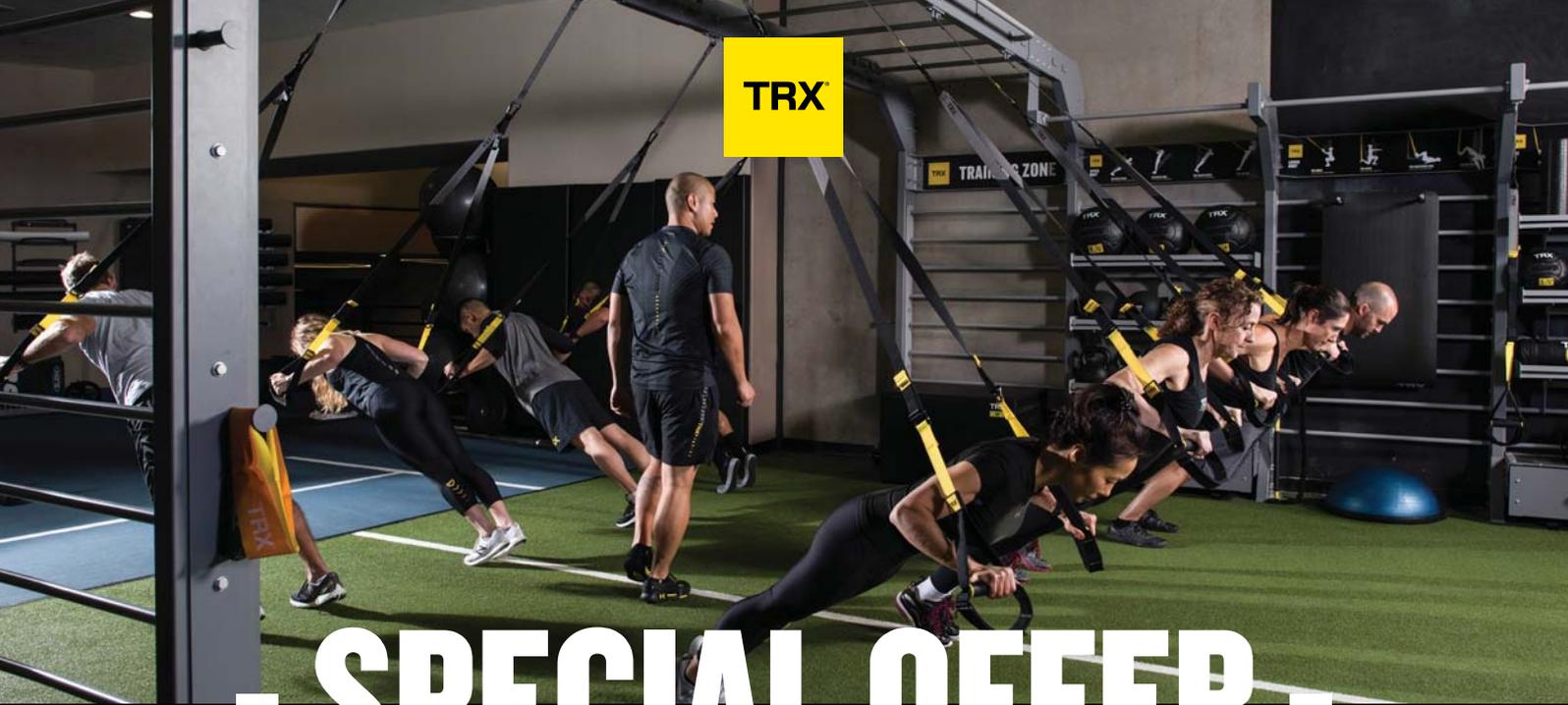
Pending the developments of COVID-19. Please contact: uksales@stagescycling.com for an up-to-date schedule of eventss.

Key personnel

David Williams
Commercial Director
Jo Headington
UK Sales Director

"Stages is our partner of choice for our studio cycling bikes. The service and support is exemplary, and is built on respect and a genuine desire to meet the needs of their customers. They have been instrumental in the transformation of our indoor cycling proposition."

John Oxley, CEO, Places Leisure



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Facebook: www.facebook.com/TRXTrainingUK

Blog: <https://www.trxtraining.co.uk/train>

www.trxtraining.co.uk



About us

TRX provides world-class functional training by offering quality equipment, effective workouts and world-class education capable of transforming full-body health. Whether you're beginning a fitness journey or pushing towards your limits, TRX Training helps you move better, feel better and live better. Trusted by premier athletes, professional trainers, enthusiasts and beginners, TRX training is proven to deliver results.

Product range and services

TRX Suspension Training® signature products include the TRX PRO4 System, TRX Tactical, TRX HOME2 System and the RIP Trainer.

We also have a full range of functional training tools including our newest product, the TRX Rocker. Our TRX Studio Line creates functional training areas available in various sizes and configurations. Our TRX app, an innovative digital platform, offers various functional workouts, and TRX MAPS allows gyms to connect better with members by facilitating movement assessments.

Key customers

David Lloyd, Nuffield Health, SNAP fitness, énergie Fitness, Third Space, Heartcore, KOBBOX, BH Live, Body Machine Performance Studio, The Fore, We are Equilibrium, University of Edinburgh, University of Bath, University of Nottingham, Loughborough University.

Future plans

The launch of our TRX for Yoga course; our newest TRX product, the TRX Rocker; and an updated TRX MAPS version; as well as promoting our studio line to offer unique flexible solutions for all gyms. We are also happy to bring our second TRX Training SUMMIT to the University of Oxford in 2020. We will be working in partnership with the Youth Sports Trust as we continue to develop our schools programme.

Shows attending

SIBEC UK, ukactive, Active Uprising & SWEAT, BodyPower, Rough Runner, Well-fit, and our own TRX UK Training Summit.



Key personnel

Nathan D'Rozario
EMEA Education & Sales Manager
Aleksandra Vicentijevic
E-Commerce Manager

■ For more information please contact

Email: ukinfo@trxtraining.com

Web: www.trxtraining.co.uk

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TVS Group

Low Bay, Commerce Street, Carrs Industrial Estate, Haslingden, Lancashire, BB4 5JT, UK

Tel: +44 (0)1706 260 220

Mobile: +44 (0)7802 725 265

Fax: +44 (0)1706 260 240

Email: Andy.Roberts@TVS-Group.co.uk

Website: www.TVS-Group.co.uk



ANDY ROBERTS

About us

Total Vibration Solutions Ltd (TVS Group) includes TVS Sports Surfaces, TVS Gym Flooring, TVS Play Surfaces and TVS Acoustics. We are specialist suppliers of noise and vibration control materials and systems for construction, industrial and railway applications. Suppliers and installers of rubber, polyurethane (PU), timber and vinyl sports surfaces and SPORTEC gym flooring, along with EuroFlex impact protection flooring and playground accessories.

Our business is balanced through a broad portfolio of products and a presence in international markets. Our strategy focuses on supplying best in class materials, shaping reliable and trustworthy partnerships while delivering outstanding customer service.

Recent projects

Anytime Fitness, Colindale: supply and installation of over 300m² of our TVS RESi Concrete Acoustic Floating Floor System in the functional training, studios and main gym areas. Our works included: full design, supply and installation of our TVS Sprung Jack-Up Flooring System to the dedicated free weight areas. All these

areas were finished with resilient floor coverings from our SPORTEC range.

Pure Gym, Bath: supply and installation of over 250m² of TVS RESi Concrete Acoustic Floating Floor System in the functional training and free weight areas. Over 350m² of TVS RESi Dry Acoustic Floating Floor System in the gym. All finished with SPORTEC floor coverings.

The Gym, Glasgow: supply and installation of over 300m² of TVS RESi Dry Acoustic Floating Floor System in the free weight and functional training areas and finished with resilient floor coverings from our SPORTEC range.

Deansgate Square, Manchester: supply and installation of the custom-coloured polyurethane sports surface and over 500m² of fabric-wrapped, impact-resistant acoustic wall panels in the sports hall. TVS Resi-FF Acoustic Floating Floor Systems installed in the fitness studios. A combination of PU and rubber floor finishes installed in other gym areas.

Third Space, Islington, London: supply and installation of neutral and colourful floor coverings from our SPORTEC range, including shock-absorbing acoustic underlays, and a custom-designed athletics tracks; all floor finishes



contributed towards a timeless space.

Broughton High School, Lancashire: supply and installation of a revolutionary and environmentally friendly combined-elastic sports flooring system in the sports hall, with court markings applied.

Key personnel

Paul Lafone

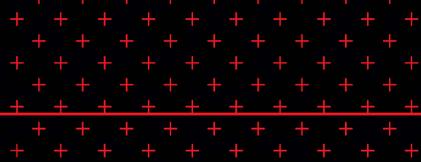
Managing Director +44 (0) 7976 801 735

Andy Roberts

Sales Director +44 (0) 7802 725 265

Chris Taylor

Projects Director +44 (0) 7802 725 266



wattbike

INDOOR CYCLING REDEFINED



Wattbike has been at the forefront of indoor cycling technology since the launch of the iconic Wattbike Pro/Trainer in 2008. In 2020, Wattbike will redefine indoor cycling with advancements in both equipment and software. Indoor cycling will never be the same again.

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[/Wattbike](https://www.instagram.com/Wattbike)



Wattbike

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Nottingham, NG11 7EP, UK

Tel: +44 (0)115 945 5450

Email: uksales@wattbike.com

Twitter: @wattbike

Facebook: www.facebook.com/wattbike

www.wattbike.com




STEVE MARSHALL

About us

Wattbike is the creator of the world's most advanced and innovative indoor bikes, developed in association with world class athletes and scientists. The versatility and reliability of the Wattbike brand has made it the go-to indoor cycling range for all health and fitness needs.

Product range and services

Wattbike AtomX – the most advanced commercial smart bike. Featuring a high-definition touchscreen performance monitor and integrated shifters, letting you seamlessly switch between ergo and gear mode. All new climb mode enables riders to tackle historic mountain ascents.

Wattbike Icon – features a high-definition Performance Touchscreen. The touchscreen elevates the cycling

experience by delivering incredibly accurate performance feedback, and includes workouts, tests and Wattbike's brand new interval builder.

Wattbike Pro/Trainer – the original and undisputed champion of indoor bikes. With over a decade of success under its belt, the Pro/Trainer is celebrated for its versatility, accuracy and adjustability.

All Wattbike products allow for seamless open platform connectivity, enabling riders to connect to all of their favourite training apps, so they can train their way.

Additional services

Wattbike transform indoor training spaces in studios and gyms with bespoke Wattbike Zone graphics, and Wattbike's new partnership with Intelligent Cycling®

software will take indoor cycling to a new level.

Key customers

Health and fitness clubs, studios, elite sport, hospitality, home users, schools and universities, and uniformed services.

Future plans

Wattbike has partnered with Intelligent Cycling®, innovators in indoor cycling technology, to bring world-first technology to the industry, which transforms indoor cycling into a truly smart, connected experience.

Key personnel

Steve Marshall, UK Sales Manager
Chris Maule, Sales Manager – Northern England, Scotland & Northern Ireland
Amy Walls, Sales Manager – Key Accounts
Marcus Partridge, Regional Account Manager – Central England & Wales
Neil Tandy, Sales Manager – London & South
Tom Crampton, Marketing Manager

■ For more information please contact
Tel: +44 (0)115 945 5450

“At PureGym we want to offer our members a low cost, high-quality training experience. Our members expect quality training equipment, which is why we have teamed up with Wattbike to install Wattbikes at our East Grinstead site. The versatility and innovation of the Wattbikes has provided a great training experience for our members and personal trainers on site, and we look forward to helping our members become healthier, and achieve their goals, whatever they are.”

Francine Davis, Commercial and Strategic Director, PureGym East Grinstead

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Fax: 0049 (0)731 97 61-118

Email: b.baeurle@zimmer.de

Facebook: www.facebook.com/icelab110/

www.zimmer.de



BENJAMIN BÄURLE

About us

With experience in technical medicine since 1969, Zimmer MedizinSysteme has become one of the leading European manufacturers for physiotherapy systems. Innovative cardiology, diagnostic, aesthetics products and software also enhance our product lines. Zimmer MedizinSysteme is the leading firm in cryo solutions, offering Cryo 6, CryoVIP -85 °C and Cold Sauna icelab -110 °C.

Product range and services

The unique Cold Sauna icelab -110 °C is up to three minutes of whole-body cryostimulation. The treatment can either be offered on its own, combined in spa menu packages, within fitness, sports and leisure packages, and even be part of medical spa offerings.

Ultra-dry cold air causes stimulation all over the body's skin, while warmth

exchange takes place mainly via convection. You will be surprised how different it feels compared to a cold-water immersion exchanging warmth via conduction.

USPs

For over 20 years, not a single Cold Sauna icelab -110 °C has been reported faulty for technical reasons. The Cold Sauna icelab uses unique software for telemaintenance, and a state-of-the-art product set-up assures the highest reliability.

The optional Heat Recovery System (HRS) can use all heat extracted from the icelab chamber to support the heating of your swimming pool. The payback of the initial investment for your cold sauna can be seen within the first few years, as operation costs are low. No nitrogen, liquid air or other gases are consumed.

Key customers

Chenot Group, including the Palace Gabala (AZ) and Palace Weggis (CH); Waldhotel at the Bürgenstock Resort (CH); Jumeirah Al Wathba Desert Resort (AE); Nad Al Sheba Club I & II (AE); The Istana Uluwatu (ID); Thermes Marins (MC); Sparkling Hill Resort (CA); Roland Garros (FR); INSEP (FR); French Rugby Federation (FR); FC Bayern München (DE); and many more...

Where in the world?

We work worldwide; you can find some references on www.whole-body-cryotherapy.com

Future plans

Continue to outperform the growth we have experienced in the past few years.

Key personnel

Benjamin Bäurle, Sales Manager icelab.



Real Temperature



Secure



Reliable



Profitable



Exclusive



Energy saver

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HCM

HANDBOOK 2020

INDEX

Industry organisations	p236
Product innovation	p240
Supplier contacts	p250

Industry organisations

National and international fitness sector associations listed in alphabetical order

Activity Alliance

Email Sarah@activityalliance.org.uk

Web www.activityalliance.org.uk

Description A national charity leading the way to provide accessible physical activity and increase participation amongst disabled people.

American College of Sports Medicine (ACSM)

Email publicinfo@acsm.org

Web www.acsm.org

Description The American College of Sports Medicine (ACSM) is the largest sports medicine and exercise science organisation in the world.

British Association of Sport and Exercise Sciences (BASES)

Email enquiries@bases.org.uk

Web www.bases.org.uk

Description BASES is the professional body for all those with an interest in the science of sport and exercise.

British Universities & Colleges Sport (BUCS)

Email info@bucs.org.uk

Web www.bucs.org.uk

Description BUCS is the national governing body for higher education sport in the UK. It works with its member institutions to get more students active more often, through competitive sport and by providing physical activity opportunities.

Chartered Institute for the Management of Sport and Physical Activity (CIMSPA)

Email info@cimspa.co.uk

Web www.cimspa.co.uk

Description CIMSPA is the professional development body for the UK's sport and physical activity sector. It is committed to supporting, developing and enabling professionals and organisations to succeed.

Chief Culture & Leisure Officers Association (CLOA)

Email info@cloa.org.uk

Web <https://cloa.org.uk>

Description CLOA advises on, advocates and champions culture and leisure on behalf of sector professionals, locally, regionally and nationally.

Club Managers Association of Europe (CMAE)

Email debbie.goddard@cmaeurope.eu

Web www.cmaeurope.org

Description A non-profit making professional association with members involved in the management of sports clubs (golf, tennis, sailing and other sports), health & fitness clubs, leisure, city and dining clubs.

Community Leisure UK

Web <https://communityleisureuk.org>

Description Community Leisure UK is a members' association that specialises in charitable trusts, delivering public leisure and culture services across the UK.



EREPS-registered fitness professionals work in 32 countries across Europe

EuropeActive

Web www.europeactive.eu

Description EuropeActive is the leading not-for-profit organisation representing the whole of the European health and fitness sector from its head office in Brussels. It aims to raise awareness of the role the fitness sector is playing to support a more active and healthier Europe.

European Register of Exercise Professionals (EREPS)

Web www.ereps.eu

Description Launched in 2007, the European Register of Exercise Professionals is an independent process for the registration of all instructors, trainers and teachers working across Europe in the exercise and fitness sector. EREPS recognises the qualifications and skills of exercise professionals and is an important assurance for the public and employers that their instructor or employee holds the appropriate qualifications to perform their role safely and effectively.

International Health, Racquet and Sportsclub Association (IHRSA)

Email info@ihrsa.org

Web www.ihrsa.org

Description The International Health, Racquet and Sportsclub Association is a trade association serving the health club and fitness industries worldwide. IHRSA aims to grow, protect and promote the health and fitness industry and provide its members with a wide range of benefits to enable them be even more successful.

International SPA Association (ISPA)

Email ispa@ispastaff.com

Web <https://experienceispa.com>

Description Since 1991, the International SPA Association has been recognised worldwide as the professional organisation and voice of the spa industry, representing health and wellness facilities and providers in more than 70 countries.



The UK Spa Association promotes universal wellness and wellbeing

PHOTO: SHUTTERSTOCK/PIXELSHOT

Register of Exercise Professionals (REPs)

Email info@exerciseregister.org

Web www.exerciseregister.org

Description The Register of Exercise Professionals – launched in 2002 and under the ownership of UK Coaching since 2016 – is an independent, public register which recognises the qualifications and expertise of health-enhancing exercise instructors in the UK, providing a system of regulation for instructors and trainers.

Sport and Recreation Alliance

Email info@sportandrecreation.org.uk

Web www.sportandrecreation.org.uk

Description An umbrella body for sport and recreation in the UK, representing 320 organisations such as the FA, RFU, British Athletics, British Rowing and the Exercise Movement and Dance Partnership.

Sport England

Email funding@sportengland.org

Web www.sportengland.org

Description Sport England works to increase the number of people who take part in sport regularly, and with the new government sport strategy will broaden its focus to encompass other forms of physical activity.

ukactive

Email info@ukactive.org.uk

Web www.ukactive.com

Description A body existing to serve any organisation in the UK with a role to play in, or benefit to be gained from, getting more people, more active, more often. It serves more than 4,000 members and partners from across the public, private and third sectors, from multinational giants to local voluntary community groups.

UK Spa Association (SPA-UK)

Web www.spa-uk.org

Description SPA-UK is a not-for-profit, impartial body composed of members and partners from across the UK spa, salon and wellness sector. It aims to provide a platform for members and partners.

Youth Sport Trust

Email info@youthsporttrust.org

Web www.youthsporttrust.org

Description A passion for the power of sport and improving children's lives has been at the heart of the Youth Sport Trust, building partnerships to forge a lasting legacy for improving young people's lives. It reaches around 20,000 schools across the UK.

HCM

SHARING THE WORLD OF FITNESS

HCM magazine is the industry's favourite read, and now you can also enjoy **Fit Tech** magazine and fittechglobal.com and stay briefed about the latest technology and innovations coming to the fitness, sports and wellness industry.

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Boutique clubs

Corporate gyms

Leisure centres

University gyms

Sports clubs

Hospitality & hotels

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PRODUCT innovation

Lauren Heath-Jones rounds up the latest product launches in health and fitness

CryoQube is a natural next step says **Adela Thornton-Wood**

Quantum Cryogenics, a Devon-based cryotherapy specialist, has launched the new CryoQube, a whole body cryotherapy chamber.

Designed and manufactured in the UK, the CryoQube offers indirect cryotherapy, which provides all the benefits of traditional cryotherapy without the user being exposed

to freezing nitrogen vapour. Instead, it delivers ultra-cold temperatures from pure air that has been pre-chilled by liquid nitrogen. Without the direct nitrogen exposure, which requires user's heads to be kept outside the unit, users can be fully immersed in the chamber.

Users can spend up to three minutes in the chamber, where they experience temperatures of -130 degrees Celsius and the skin cools to around 15 degrees Celsius. At this temperature the body releases endorphins, helping to reduce inflammation and numb pain.

Adela Thornton-Wood, co-founder of Quantum Cryotherapy, said: "Developing CryoQube was a natural next step for us as a company and builds on our 40-year heritage of providing high-quality cryogenic control systems."

"It's an exciting new venture for us and we're delighted to be manufacturing our cryotherapy chambers for the sports, health club and spa markets."



"Developing CryoQube was a natural next step for us as a company and builds on our 40-year heritage of providing high-tech, high-quality cryogenic control systems"

Adela Thornton-Wood



Users spend up to three minutes in the chamber

fitness-kit.net KEYWORD

QUANTUM CRYOGENICS

FreeRunner delivers a revolutionary running experience, while cutting costs for owners, says **Tim Hawkins**

Treadmills are the number one cardio equipment used in the gym – but they’ve seen the least amount of innovation in the past 15 years. If the unforgiving deck causes joint pain or flares an old injury, members are banished to the elliptical. If a deck needs to be replaced every two years, it’s ‘just a cost of doing business’.

Free yourself from what you know about treadmills with the new Star Trac FreeRunner™. This patent-pending treadmill generates a revolutionary feel for both runners and walkers with its HexDeck System – an aluminium running deck supported by proprietary hexagonal polymer suspension.

Whether you’re a facility buyer, performance runner or recovering from an injury, this treadmill improves performance and comfort, while significantly increasing belt and deck life.

A standard treadmill is a hindrance to aggressive training, potentially causing injury or pain from repetitive pounding on an unforgiving surface. The HexDeck offers unprecedented responsiveness with an initial cushion and flex when the foot



“We were one of the industry’s first brands with a deep heritage in the treadmill business as one of the originators of tracking technology”

Tim Hawkins

strikes, reacting immediately to impact. The returning support for the push off the toe mimics that of an Olympic track.

University-based research participants described the feeling as “very easy on the legs, with low impact on the feet”, and “less work than a standard treadmill.” For running, there’s no better outdoor training substitute than the FreeRunner. In an independent study by California State University, over than three quarters of participants preferred it to a traditional treadmill.



The aluminium deck dissipates heat and reduces wear out

For members less fond of rigorous cardio sessions, the unique design of FreeRunner makes aerobic activity easier for every fitness level.

Core Health & Fitness senior master instructor and running world record holder Sonja Friend-Uhl says: “If there’s one word I’d use to describe the feel of the FreeRunner it would be ‘responsive’. The surface and mechanics allow one’s running or walking form and gait to work FOR them. It’s not so soft that it slows down your cadence, rather it cushions your impact and allows your foot to roll and then push off efficiently. It’s the closest surface to a Mondo (all-weather) running track I have ever experienced.”

Facility owners will also enjoy reduced maintenance requirements. FreeRunner’s

aluminium deck dissipates heat and keeps the belt surface cooler than a traditional treadmill, reducing wear and tear and extending belt life.

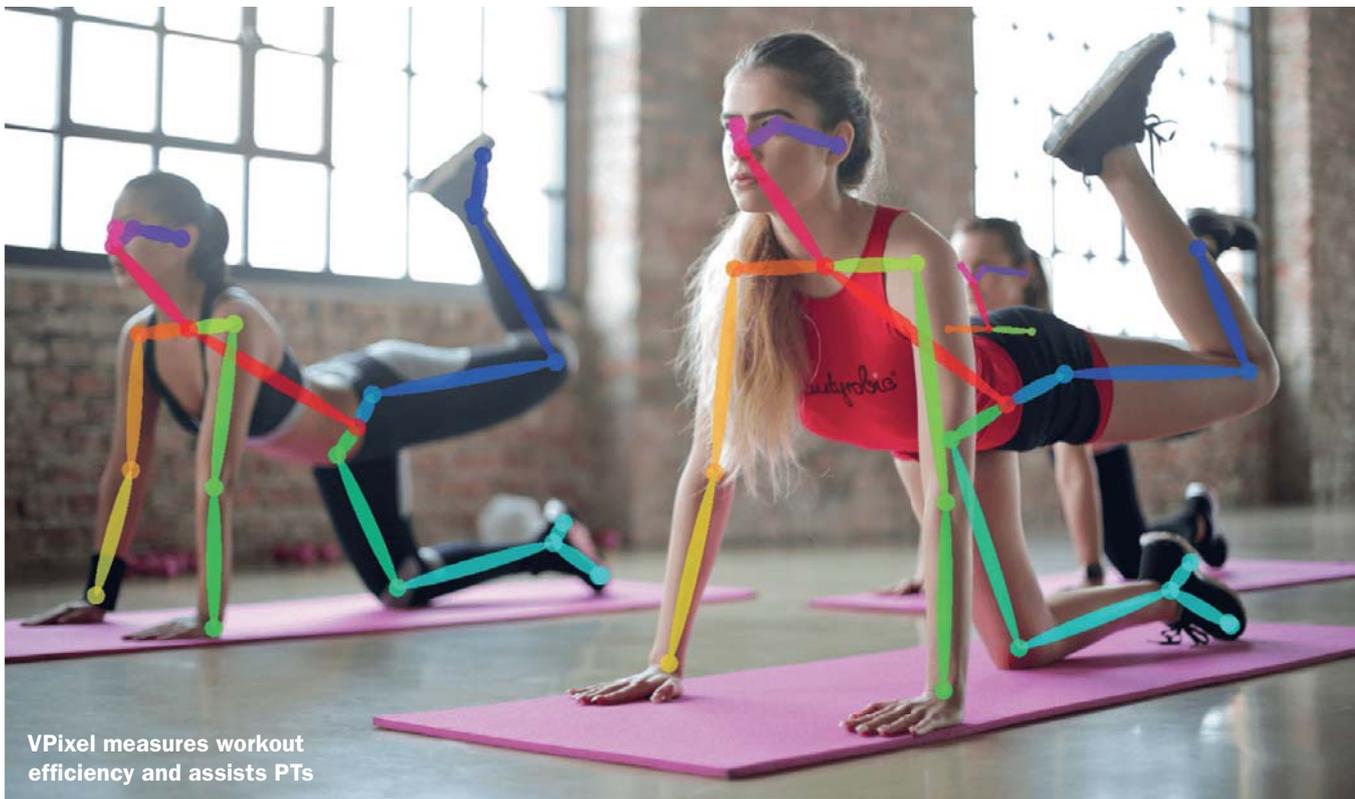
Star Trac says its FreeRunner is the only cardio product to use a thin, phenolic layer that can be replaced, rather than changing the entire deck.

“Star Trac has taken back its position at the front of the pack. We were one of the first brands with a deep heritage in the treadmill business,” says Tim Hawkins, Core’s global VP of sales and marketing.

Star Trac is also unveiling a series of consoles with OpenHub technology, taking the treadmill experience to even greater heights.

fitness-kit.net **KEYWORD**

CORE HEALTH



VPixel measures workout efficiency and assists PTs

► VPixel enhances the fitness experience, says **Simas Jokubauskas**

Agmis, a tech company based in Lithuania, has developed an AI gym motion tracking solution that tracks the movements of club members as they exercise.

Called VPixel Fitness, it's designed to improve the overall gym experience, and harnesses AI and digital imaging technologies to measure workout efficiency, reduce the risk of injury, assist PTs and add a gamification element that encourages member retention.

Using standard video cameras, the system monitors members, ensuring exercises are being performed correctly. If not, a notification is sent to a staff member alerting them that a member requires assistance.

It also measures workout duration and activity levels and is even capable of predicting when members are likely to cancel memberships.

Simas Jokubauskas, head of product development at Agmis, says: "Our mission is to

enhance the fitness experience for gym members by leveraging the power of visual and digital technologies.

"VPixel provides a highly customisable framework that can be adapted to the needs of an individual gym.

"VPixel monitors gym members to determine if the exercises are performed correctly to reduce risk of injury. It can predict the likelihood of members quitting based on their activity."



"VPixel provides a highly customisable framework that can be adapted to the needs of an individual gym"

Simas Jokubauskas

fitness-kit.net **KEYWORD**

AGMIS

OceanIX bike is part of a cause, says **Uffe A Olesen**

Indoor bike manufacturer Body Bike has teamed up with Plastix to launch the world's first indoor bike, made from reclaimed plastic.

Aptly named OceanIX, the bike features the functionality of the company's SMART+ model and includes ANT+ and BLE integration. This enables users to track their performance data via a smartphone or mobile device.

Available in the colour ocean blue, the OceanIX is built entirely from recycled plastic from reclaimed commercial fishing nets. The plastic was sourced from Plastix, a



“OceanIX is something we're incredibly proud of. It isn't just a piece of gym equipment. It's part of a cause. It's something we're doing because we feel it's the right thing to do”

Uffe A Olesen

Denmark-based company that buys used plastic fishing nets from commercial fleets around the world to prevent the nets from being left in the ocean or going into landfill.

Once collected, the nets are manually sorted before being turned into pellets of recycled plastic that can then be repurposed; in this case, as OceanIX indoor bikes.

Uffe A Olesen, chief executive officer of Body Bike, says: “OceanIX is something we're incredibly proud of. It isn't just a piece of gym equipment. It's part of a cause. It's something we're doing because we feel it's the right thing to do.

“It's also the first piece of commercial gym equipment in the world to use this recycled material,” Olesen adds.

fitness-kit.net **KEYWORD**

BODY BIKE



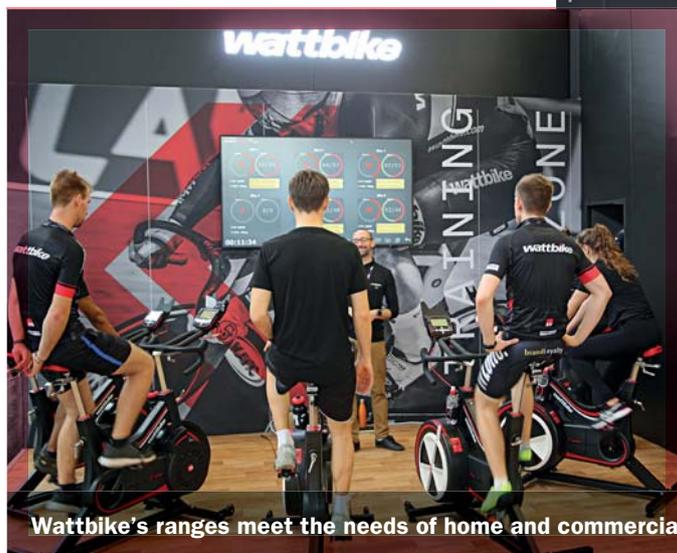
The plastic for OceanIX comes from recycled fishing nets





“These new products offer the market a complete indoor cycling solution. We have indoor bikes that cover both home and commercial fitness sectors, and user groups from general health and fitness, to elite sport”

Richard Baker



Wattbike's ranges meet the needs of home and commercial fitness sectors



ATOMX

Two new Wattbikes, the Atom X and Icon, offer complete indoor cycling solutions that create immersive experiences for the rider, says **Richard Baker**

Wattbike has expanded its existing product range with the launch of two new indoor bikes.

The first, Atom X, is billed as a health and fitness industry game changer. Building on the success of Wattbike's Atom cycle, Atom X is a smart bike designed to give riders a fully connected, immersive cycling experience.

It features a series of in-built interactive workouts, tests, training plans and climb mode, all accessible from the touchscreen performance monitor. Other

features include smart tech that enables third-party connectivity, so members can train their way.

The second launch – the Wattbike Icon – is described as an evolution of the Wattbike Pro/Trainer, and was designed to elevate the user experience.

It features the all-new Performance Touchscreen, which has an HD display to deliver advanced performance feedback for a fully connected user experience.

Richard Baker, Wattbike's chief executive, says: “These new products offer the market

a complete indoor cycling solution. We have indoor bikes that cover both home and commercial fitness sectors, and user groups from general health and fitness to elite sport.

“With this, we offer our customers a virtual cycle from their home, health club, hotel or work.

“Our mission is to continue leading the market with our advancements and technology,” he added.

fitness-kit.net **KEYWORD**

WATTBIKE



Wattbike Icon gives performance feedback



“It is our mission to make facilities more successful on every level. We aim to connect all suppliers to our new open eGym Cloud for the benefit of all”

Christin Goerlach



Vision is a 15.6” HD console/screen offering a high-resolution training interface

eGym innovations encourage motivation and retention, says **Christin Goerlach**

Fitness kit and software specialist eGym has launched its new and innovative Vision system.

Present on all of the brand’s smart electric strength equipment, Vision is a 15.6” HD console/screen offering a high-resolution training interface designed to transform the training experience and drive motivation among exercisers.

Additionally, the brand has also upgraded its open-cloud platform, eGym ONE, to include a standard API that enables suppliers, including

Precor, Pulse Fitness, Matrix and Life Fitness – among others – to offer users individually tailored workouts on all connected partner machines.

Christin Goerlach, eGym’s country director for Germany, Austria and Switzerland, said: “It’s our mission to make facilities more successful on every level.”

Adding: “We aim to connect all suppliers from the training floor – strength, cardio, mobility or others – to our new open eGym Cloud for the benefit of all.



eGym Cloud connects all suppliers from the gym floor

“We need to make sure that members achieve their goals and have fun. Eventually, these drivers lead to higher motivation and a higher retention rate. This is why

we’ve developed our smart equipment and apps for trainers and members,” Goerlach added.

fitness-kit.net **KEYWORD**

EGYM



The Funxtion system can replace or support instructors

► Funxtion’s experiential multi-screen solution ‘engages members’, says **Ernst De Neef**



“We recognise that every workout space is unique; our offer provides multiple content delivery options to suit a wide array of environments and budgets”

Ernst De Neef

Interactive digital fitness creator Funxtion has launched the Funxtion Experience Multi-Screen Solution to enable the digital delivery of multiple exercise demonstrations to numerous screens programmed to run concurrently.

Nominated in the FIBO Innovation & Trend Awards in the digital fitness category, it consists of a series of digital displays connected to a host.

The Funxtion Experience Multi-Screen offers personal

guidance to users as they make their way through the different zones. This frees up the time of Personal Trainers, particularly in class situations, which enables them to instead spend dedicated time with individual members.

Additionally, the multi-screen allows operators to create immersive, boutique experiences by integrating music and lighting controls.

On launching the Funxtion Experience Multi-Screen, Ernst De Neef, chief executive

at Funxtion, said: “We recognise that every workout space is unique. To reflect this, our offer provides multiple content delivery options to suit a wide array of environments and budgets.

“Funxtion delivers fitness content to the gym floor, creating motivating, virtually-instructed workouts that engage members and support trainers.”

fitness-kit.net **KEYWORD**
FUNXTION



The solution assists with member engagement

Fisikal enables operators to focus on front-of-house delivery, says **Rob Lander**

Fitness technology company Fisikal has developed a new digital business management solution for personal trainers and studio operators.

Available via a monthly subscription service, with prices starting from £75 per month, the new platform offers a range of features, including client engagement, payment solutions, financial status reports, real-time booking



“The platform is like having an accountant, operations manager and client services officer on hand 24/7”

Rob Lander

and member assessment, to support operators with the day-to-day running of their business. Feedback on business performance is also available via the system.

In addition, Fisikal offers a free-to-download member app, which enables them to manage their bookings, make purchases, manage payments and access a library of fitness content.

Rob Lander, Fisikal’s chief executive officer, says: “This

system puts an end to paper records and hours of manual data collation.

“The platform is like having an accountant, operations manager and client services officer on hand 24/7, all working to improve business efficiencies and enhance the customer experience, but at a fraction of the cost.”

fitness-kit.net **KEYWORD**

FISIKAL



The bench is a functional workout training station

Jordan HIIT Bench combines unique programming with storage solutions, says **Neil Jordan**

Jordan Fitness, a UK-based supplier of fitness equipment, has launched its new HIIT Bench, a multi-use workout bench which serves as a functional workout training station, weight bench, plyo box and storage unit.

As a standard, each HIIT Bench is capable of storing five sets of dumbbells, two kettlebells and a medicine ball, as well as smaller items, such as skipping ropes,

power bands and aerobic resistance bands.

This makes the HIIT Bench a perfect solution for smaller boutique gyms and studios, where space is at a premium; although it can also still be used in larger gyms and workout spaces.

As the HIIT Bench is customisable, it offers operators the opportunity to add their own logo and select a colour they prefer.



“We wanted to create something really special using local British manufacturers”

Neil Jordan

Neil Jordan, founder and chair of Jordan Fitness, says: “We wanted to create something really special using local British manufacturers. With our gyms and franchise directors demanding storage solutions and unique programming for their clubs, the opportunity to bring the two together made sense.”

fitness-kit.net KEYWORDS

JORDAN FITNESS



Kaia Health offers users personalised feedback

Kaia Personal Trainer has potential to ‘democratise sustainable fitness’, says Maximilian Strobel

Kaia Health, a digital health specialist, has created a new personal training app that could be used in clubs to offer virtual personal training to its members.

The Kaia Personal Trainer app was developed with physiotherapists and fitness experts and combines AI-powered motion tracking technology with personalised

training to offer customised full-body workouts.

To use the app, users simply stand several feet away from their smartphone camera and begin exercising with video instructions. The app then tracks the activity using a 16-point system that compares the metrics of actual movement against ideal movement. It then offers users personalised real-time audio feedback, advice and encouragement to improve fitness and performance.

Maximilian Strobel, head of the AI Lab at Kaia Health, says: “The app puts users in control of their performance and becomes a part of their everyday routine.”

“We’re excited by our patent pending AI-powered motion tracking technology and virtual PT as it has the potential to democratise access to sustainable wellness and fitness training worldwide.”

fitness-kit.net KEYWORD

KAIA HEALTH



“We’re excited by our patent pending AI-powered motion tracking technology and virtual PT as it has the potential to democratise access to sustainable wellness and fitness training worldwide”

Maximilian Strobel



Physiotherapists and fitness experts developed the app



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