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2021-2022

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Taking stock and moving forward

A great deal has happened since we published the 2020 Handbook. At the time of going to print last year, Covid was tightening its grip and the sector was closed worldwide. At that point, we could only guess the journey the pandemic was going to take us on. We suspected it was going to be painful and it has been. We have just lived through the plot of a dystopian novel.

Our 2021 Handbook takes stock of this unprecedented period. With the latest research and expert opinion, we look back at the ways Covid has reshaped the health and fitness sector, and also look forward to how operators can embrace the opportunities created in the new landscape. Good luck everyone!

Happily, at the time of going to print with our 2021 Handbook, the situation is looking much brighter. Although it's far from over - in the UK the infection rate and deaths are still rising daily - the success of the vaccination programmes should hopefully mean lockdowns are consigned to history. With the final restrictions now being lifted, operators can offer their full suite of services and are



no longer hindered by the reduced capacities which was making some businesses unviable.

Despite the lockdown scare stories in the mainstream media that people had found alternative ways to exercise and didn't need their gym memberships anymore, the bounce back has beaten expectations and has been stronger after lockdown 3 than lockdown 1.

According to Anytime Fitness, April was the busiest ever month for membership sales in the UK, despite missing many trading days. The Gym Group's stock has jumped about 28 per cent this year and Pure Gym's membership is almost back to pre-pandemic levels.

It has been an exhausting 18 months and it's good to be back, but the work doesn't stop here. Covid made existing health inequalities worse and the sector hasn't done enough to bridge that gap. Now the challenge is to play our part in making more people more healthy and building back fairer.

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SHUTTERSTOCK/JACOB LUND

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The world's first virtual reality gym and the world's first social wellness club. Kath Hudson looks at some of the exciting new concepts to emerge in the last year

PHOTO: ZAHIRINA ROBERTSON



Emma Barry gives her take on moving forward



SHUTTERSTOCK/FOTODANALUCIA

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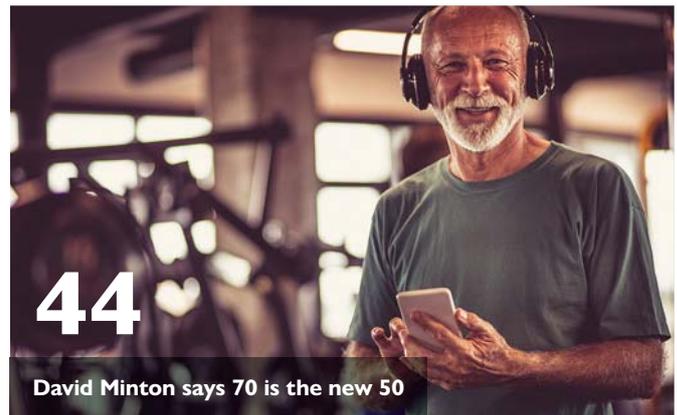
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MLADEN ZIVKOVIC/SHUTTERSTOCK

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David Minton says 70 is the new 50



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Thanks to Covid, outdoor exercise is here to stay

PHOTO: GROUPE JFP COMMUNICATIONS VISUELLES

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PHOTO: JOHN MARSHLAND PHOTOGRAPHY



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MEET THE TEAM



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HCM Fitness Trends

HCM take on the top trends which will impact the industry in 2021 and 2022

Numbers do not indicate a ranking

- 1 GLOBAL MEMBERSHIPS
- 2 MEDICAL
- 3 OUTDOOR FITNESS
- 4 FRANCHISING
- 5 RETAIL LOCATIONS
- 6 CELEB INVESTORS
- 7 LIFETIME VALUE
- 8 HOTEL GYMS
- 9 WILD SWIMMING
- 10 HYBRID EVOLVES
- 11 INSOURCING
- 12 SUBURBAN GYMS
- 13 OBESITY MANAGEMENT
- 14 RECOVERY
- 15 METABOLIC HEALTH
- 16 LOW INTENSITY EXERCISE
- 17 SNACKABLE WORKOUTS
- 18 MENTAL HEALTH
- 19 UPSELLING
- 20 RUNNING



SHUTTERSTOCK/ MONSTAR STUDIO

Health clubs can now compete for members anywhere in the world

NO BOUNDARIES

1. GLOBAL MEMBERSHIPS

The pivot to digital, prompted by the pandemic, has led to the majority of operators committing to the production of digital content – live-streamed, on-demand, or both.

This is creating the opportunity for members to sign up from anywhere – crossing borders and time zones and ‘joining’ studios, clubs and gyms far from home, meaning they can work out with experts from the top gyms around the world, just as easily as they can the club down the road.

This opportunity brings operators head to head with digital-only home workout offerings, such as Peloton, Mirror and Forme.

Few operators have started marketing this option actively, but consumers are already opting in, with reports of people joining overseas clubs for their digital offerings, while keeping a physical gym membership closer to home.

We expect this trend to become a new measure of success for operators.

POWERFUL ALLIES

2. MEDICAL

The stated policy aim of key trade associations in the health and fitness industry, including IHRSA, EuropeActive and ukactive, is for the sector to be recognised as an extension of the medical profession, playing an essential role in both prevention and cure in relation to lifestyle diseases, such as diabetes, cancer and heart disease.

The sector is stepping up to this challenge, developing training protocols for staff to bring their expertise in line with standards in the allopathic medical community, so collaborations can take place seamlessly and with shared liability for the delivery of cardiac prehab and rehab, for example.

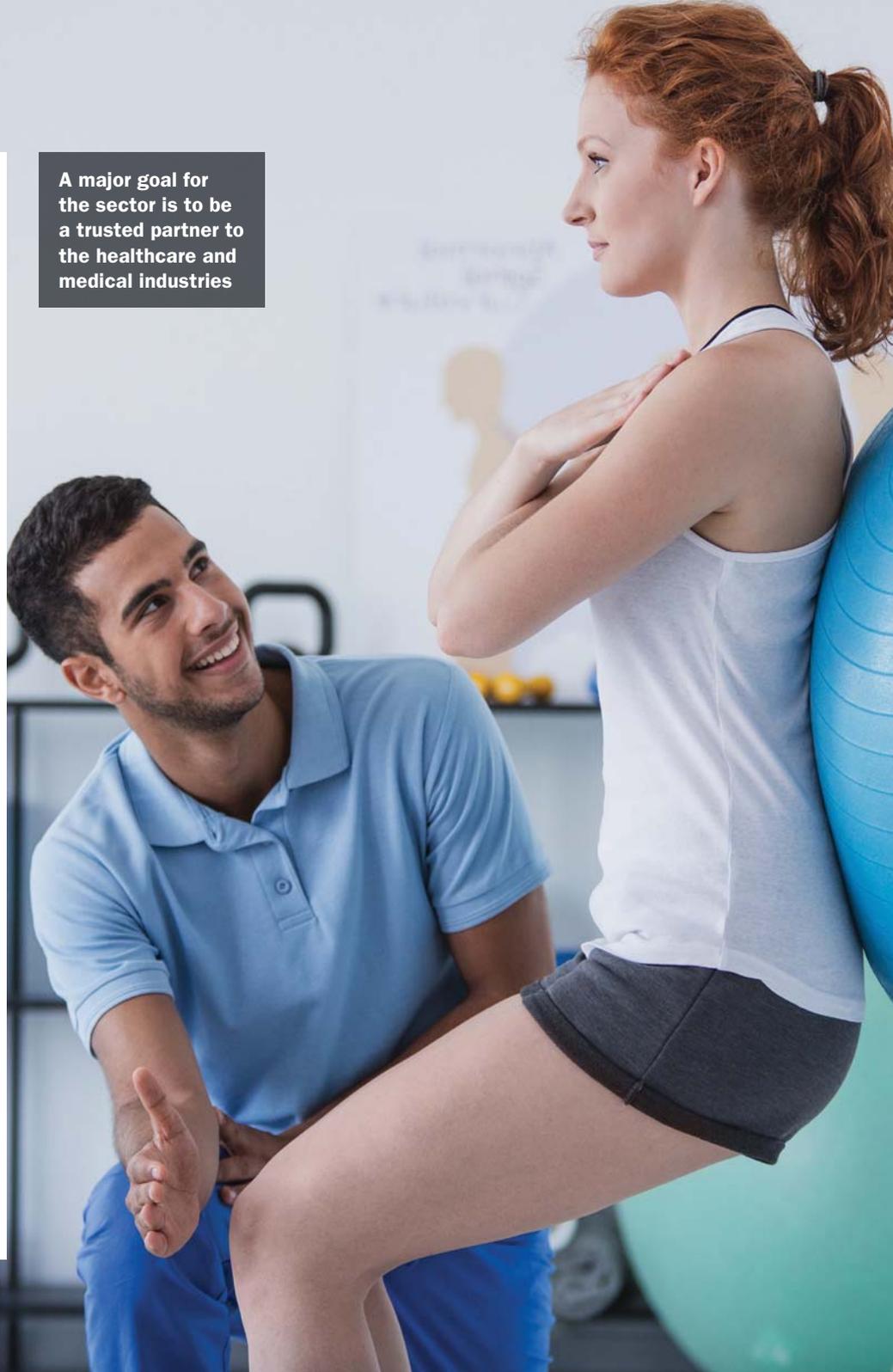
We expect the sector to divide along these lines between operators – both public and private sector – who embrace this link with the medical world and those who see their mandate as being purely operators of gyms and health clubs.

There are other dimensions to the medical trend, as some high net worth individuals use private sector wellness and health operators to get regular health checks to avoid these being recorded on their medical records, with the aim of keeping health insurance premiums down.

Some operators cater for this demand by offering bloodwork and other tests on an annual basis.

Whatever the tie-up, health clubs are ideally placed to be partners.

A major goal for the sector is to be a trusted partner to the healthcare and medical industries



REAL ESTATE

3. RETAIL LOCATIONS

Health club operators and fitness suppliers have been operating in retail locations for decades, but the pandemic will accelerate this trend, as more retail spaces become available, opening up opportunities to scale and to innovate, with larger properties being developed.

In the US, Life Time has been taking over redundant shopping malls, for example, and developing health resorts of over 200,000sq ft. We expect this trend to accelerate globally, as investors move to optimise distressed retail real estate while answering the demand from consumers for comprehensive wellbeing, fitness and health services.

GROWTH POTENTIAL

4. FRANCHISING

Franchise businesses have been scaling for decades, harnessing the capital, entrepreneurialism and energy of owner-operators to drive rapid growth.

Now some are stepping it up, with the IPOs of Xponential Fitness and F45 demonstrating the value of the sector.

With huge expansion potential in the market, we expect new entrants and the acceleration of roll-outs from existing players, making the fitness franchise market still one to watch.



SHUTTERSTOCK/WALLENROCK

COVID-19 has created an huge appetite for outdoor exercise

OUT IS THE NEW IN

5. OUTDOOR FITNESS

COVID-19 has made many people reconnect with the great outdoors because so many activities have been shifted outside – gyms included.

Being outdoors gives a number of important health benefits, including lowering blood pressure and heart rate and as it feels less strenuous people tend to work harder.

Studies show exercising in natural environments boosts serotonin production which decreases anxiety and depression.

Many operators are already embracing the trend by adding outdoors to their hybrid models in a number of ways: permanent outdoor spaces, classes in car parks or local public spaces and organised running, walking, cycling and open water swimming groups.

In the past operators have waved goodbye to members when they drifted off to exercise outside on their own during the summer, but with this new mentality they can continue to keep them engaged.



Celebrity investors such as Justin Timberlake are bringing cash and kudos to industry businesses

SHARED OBJECTIVES

6. CELEB INVESTORS

Wealthy celebrities, such as actors and sports stars have been investing in the leisure industries for many decades, with a previous preference for hotels, restaurants, night clubs and golf resorts.

However, as being fit becomes a part of image-making and celebrities increasingly enlist the support of private personal trainers and wellness advisers, their interest is turning to investments in the health and fitness industry, with celebrities – such as

Mark Wahlberg, with his stake in F45 – becoming a regular source of investment for businesses in the fitness industry.

We expect to see an increase in this type of investment, as celebrities whose personal brands align with fitness, seek to build their consumer-facing image and their investment portfolios in the industry.

Growing tech and wellness business, Therabody, recently revealed a roster of 100 celebrities have backed the company,

with names such as footballer Marcus Rashford, rapper Jay-Z, actor Daniel Craig and musicians Rihanna, Justin Timberlake and Shawn Mendes all named.

The value of celeb investors to fitness brands far exceeds money, given the reach and marketing help celebrities bring, although decision-makers in the fitness industry will be mindful of the need partner with the right celebrities, given the failure of Madonna's gym chain, Hard Candy. ►

► INDICATION OF SUCCESS

7. LIFETIME VALUE

Many health clubs operate on a subscription model, meaning the aim of operators is to keep members signed up for as long as possible to control their customer acquisition costs.

We expect lifetime value to become a key metric for investors and operators when it comes to understanding the success of any operation and for this measure to be used by analysts to track performance, customer satisfaction and to make comparisons between competitors.

NEW COMPETITION

8. HOTEL GYMS

The UN World Tourism Organization estimates that 2020 saw a 74 per cent drop in tourist arrivals, with a billion fewer trips being made due to COVID-19.

The hotel sector has responded by ramping up marketing to attract people living in local markets.

We expect to see more hotel operators focusing on their health and fitness offerings and competing with local gyms for members, while also developing links to wellness if they have spas. Some hotels are pivoting to be private members' clubs, competing with gyms in urban locations.



SHUTTERSTOCK/DZIEGLER

The majority of wild swimmers intend to keep going through the winter

SWIMMERS STEP UP

9. WILD SWIMMING

Lockdown forced us to get inventive and with swimmers unable to get their fix with pools closed, wild swimming grew in popularity.

A survey by *Outdoor Swimmer* found 75 per cent of those who'd taken it up were planning to keep going through the winter.

Some started because pools were closed, others had considered it, but the pandemic made them take the plunge. Enjoyment rates were high and only 2.3 per cent stopped when pools re-opened.

It wasn't just open water spots: lido operators found people were happy to get in cold water if it meant they could swim, so some were able to extend their season.

With wild swimming reported to be good for mental health and menopause, this is another trend with traction. Operators can get on board by organising trips to open water sites, as well as educating members on the equipment needed and how to swim safely in open water.



SHUTTERSTOCK/MILLES STUDIO

NEXT LEVEL DIGITAL

10. HYBRID EVOLVES

Up until the start of 2020, many health and fitness operators were talking about going digital, but still kicking the can down the road, until overnight they had to figure it out, making hybrid arguably the most impactful change of last year.

Making the change during normal times would have been harder, as expectations would have been higher on either side. The

immediate pivot meant rough and ready approaches were embraced with gratitude by locked-in members who didn't mind that during a yoga class the teacher's neighbours could be heard having an argument or the camerawork was a bit wobbly.

Now all the MVPs have been road-tested we'll continue to see slicker, next-generation versions, as operators make their models more engaging and respond to demand for fresh content.

We're also seeing innovation in the model, with health club operators

Hybrid offerings will develop to include more complex in-club elements

collaborating with digital-only brands to create physical locations by reversing digital-only offerings into gyms.

We expect to see huge innovation in this market as investment is attracted to the potential scale and the demand from consumers and new tech makes integration with wearables even more sophisticated. ▶

GOING IN-HOUSE

11. INSOURCING

Following a year of closures and ongoing limits on capacity, we expect to see more local authorities bringing their leisure centre operation back in-house, as the contracts become less viable for the private sector.

The £100m national leisure recovery fund is expected to be insufficient to make up for the financial blow of the past year. The Local Government Association is developing an insourcing guide for councils to remobilise their leisure services. (See *HCM* 2021 issue 7).

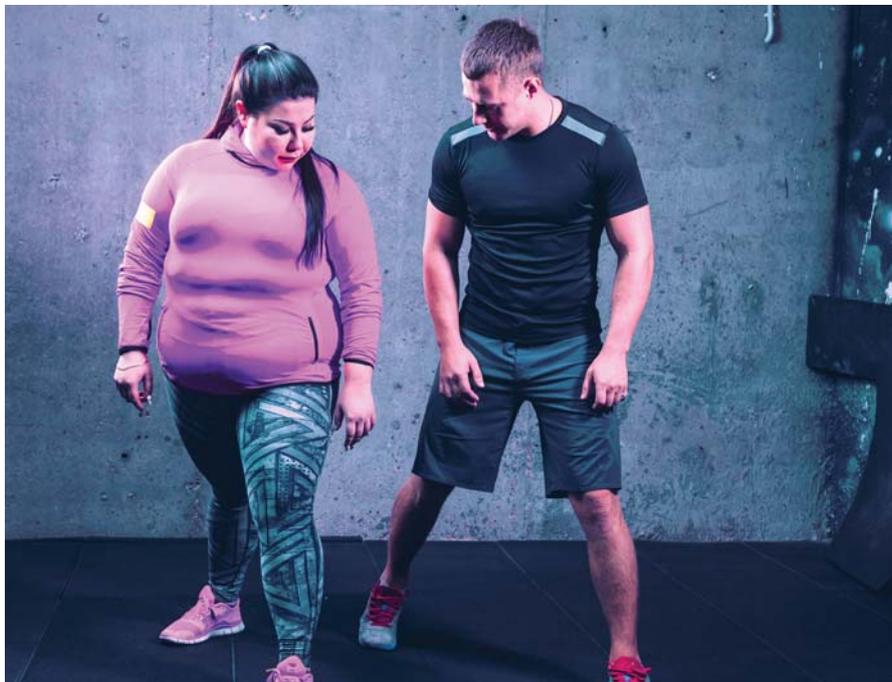
CHANGING FOCUS

12. SUBURBAN GYMS

Health club operators have historically targeted areas of cities with extensive office developments and large numbers of commuters for their premium sites, while suburban gyms have been seen as secondary locations.

However, working from home has turned this on its head, with city-centre locations hit hardest and suburban gyms benefitting from big increases in membership and usage.

Many operators have already refocused their energies on suburban locations, creating competition for good sites. We expect this trend to continue.



SHUTTERSTOCK / UFABIZPHOTO

Weight management needs a 360 approach, with professional support

EFFICACY FOR ALL

13. OBESITY MANAGEMENT

In the past, the industry has been reluctant to shout too loud about weight loss. Partly because it's hard to get good outcomes and partly because the industry has tried to distance itself from the idealised body image. However, now is undoubtedly the time for operators to step forward with robust weight management programmes. The desire to lose weight and change lifestyles has never been higher both at population and government level.

Simply giving a member an exercise programme and sending them out onto the gym floor is not enough. Weight loss needs a 360 approach, which involves looking at

exercise, diet, mindset, stress levels and lifestyle. Creating a community to keep individuals motivated and accountable on their journey is also crucial. Any weight management programme needs to be viewed as a long term project of many months to ensure the weight loss is sustainable and the behaviour changes bed in. Some upskilling may be required to ensure staff are able to deliver interventions effectively.

With collaborations starting to happen - ACE with Precision Nutrition and Everyone Active with Weight Watchers Reimagined - it will be interesting to see the impact. See *HCM* issue 5 for more on this subject.

TRACKING REST

14. RECOVERY

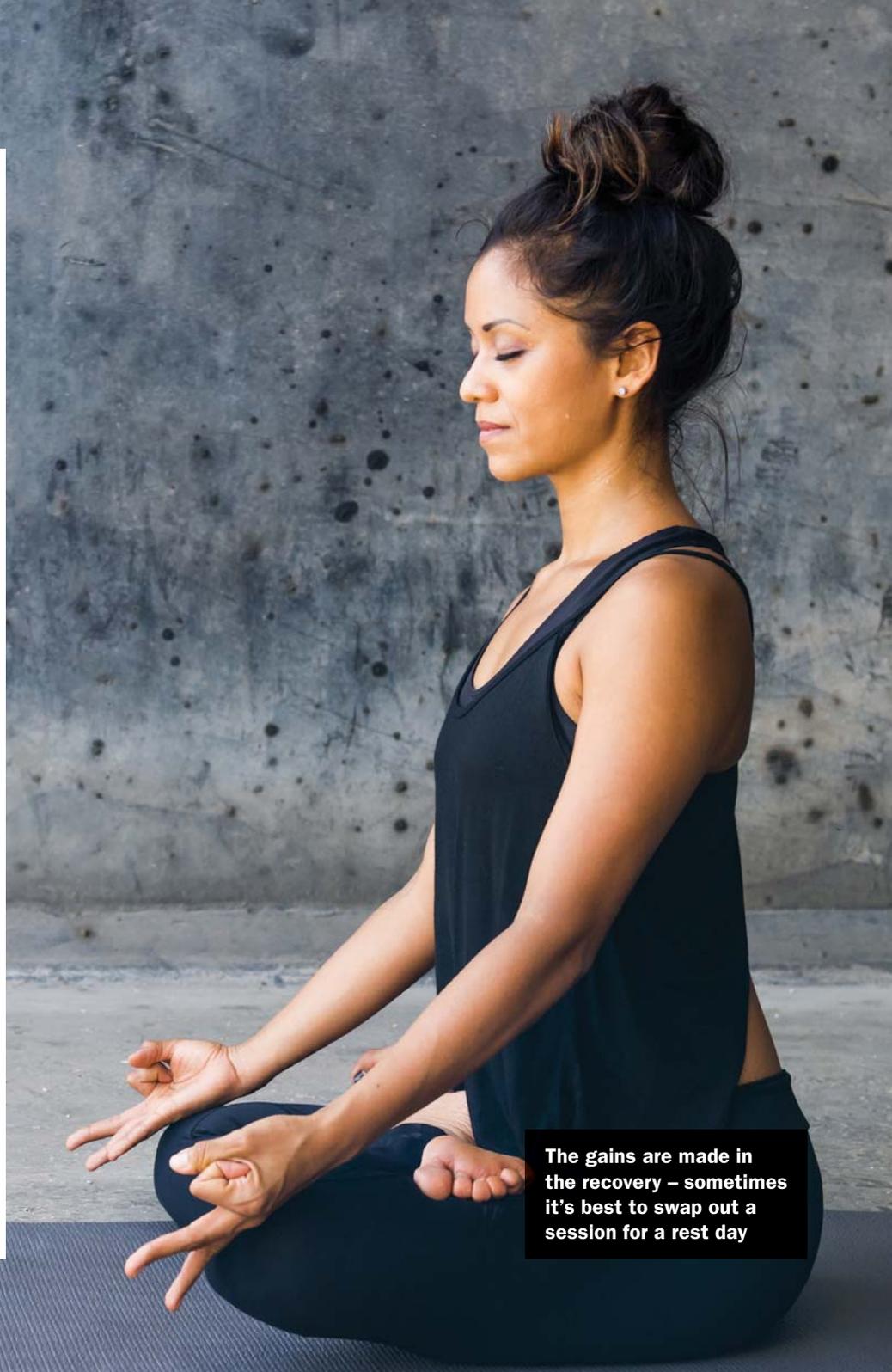
For motivated members, guilt about not working out or being over-enthusiastic about meeting goals can lead to over-exercising, but the biggest gains are made in the recovery.

Elite athletes and coaches have known for years that progress happens on rest days. Our bodies adjust to a stressor by triggering growth mechanisms and once the stress is over, we shift to recovery and rebuilding mode to adapt to the stressor.

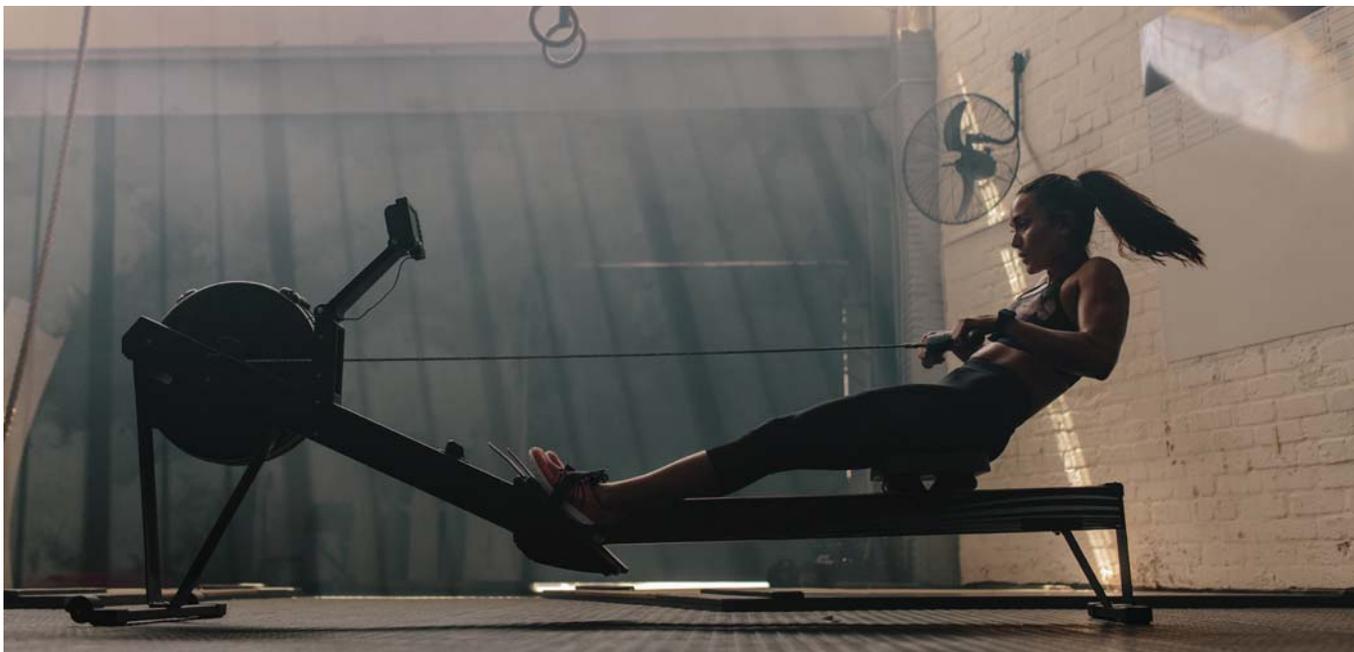
If we over-exercise or are dealing with a lot of stress, our bodies can't recover which can lead to a number of problems: plateauing or going backwards in performance, greater susceptibility to illness and injury, hormonal disruption and gut issues.

Like everything else, recovery needs to be individualised and so we expect to see widespread use of heart rate variability to inform training plans.

We'll also start to see investment in recovery techniques: from hot tubs and saunas to high-altitude chambers, infrared therapy, cryotherapy, supplements and swapping out hard workouts for gentle sessions like Pilates or yoga. Alongside this there will be further data and research to establish what has the greatest benefit, further helping operators to optimise their members' health.



The gains are made in the recovery – sometimes it's best to swap out a session for a rest day



SHUTTERSTOCK/JACOB LUND

Working to achieve good metabolic health will become an important goal for members and an opportunity for operators

▶ **EMERGING TREND**

15. METABOLIC HEALTH

We think delivering metabolic health programmes will be one of the next frontiers for the sector, as consumer interest in these vital measures continues to grow.

The developed world is facing a huge challenge in this area, with a recent study showing that only 12 per cent of Americans are metabolically healthy – which means having ideal levels of blood sugar, triglycerides, high-density lipoprotein (HDL) cholesterol, blood pressure, and waist circumference, without using medication.

Many health club operators have the skills, training and facilities to deliver

metabolic programmes and give advice on exercise and lifestyle measures that are proven to improve metabolic health, such as building muscle mass, aiming for optimal hydration, ensuring good sleep health and following the right diet.

This requires the right balance of sodium and potassium to ensure cellular health and a focus on foods with a low glycemic index.

Metabolic health programmes ideally start out with an assessment of the current state of metabolic health, creating an opportunity to upsell tests to members and to collaborate with the medical sector.

This in turn will enable operators to deliver more effective programmes

and proven outcomes, enhancing the value of services and delivering on the medical wellness trend.

In addition, we expect to see the launch of accurate and cost-effective monitoring tools, such as apps and online services, which will enable consumers to learn about, track and control their own metabolic health.

As the fit tech sector gears up to tackle metabolic health with new product launches, the resultant marketing will drive increased interest and demand from consumers in metabolic health programmes, making this the time to be venturing into this space.



Gentle exercise will become more popular as the market changes

TIME TO SLOW DOWN

16. LOW INTENSITY

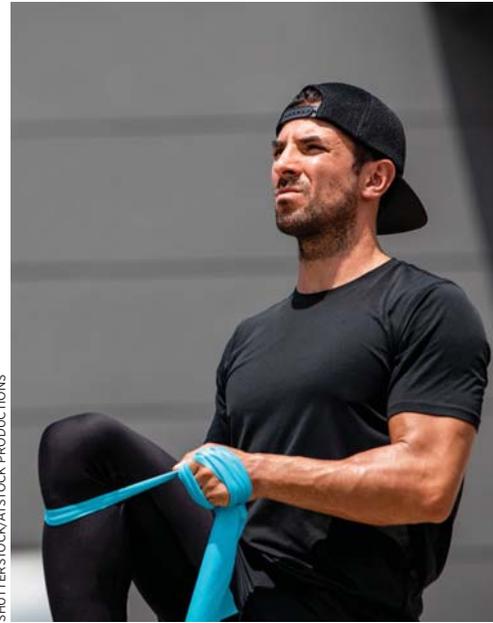
High-intensity exercise has been popular for years now, as many gym-goers want a big bang for their buck when it comes to their workout, getting the most benefits in the shortest possible time. Although many existing members love a beasting, for those who have never had a gym membership, high-intensity workouts and heavily choreographed classes can be offputting. Sometimes less is more.

As we head into a changing landscape, with the industry doing its bit to right

the health inequalities and reach out to different markets, we will have people coming to clubs who are less time-pressured, and who will appreciate more gentle, low-intensity exercise.

Older age groups will value these options and even HIIT lovers might like to bring a slower-paced session into their weekly routine to help them relax.

Think Hatha, yin and Nidra yoga, easy strength classes and walking groups to build a sense of community.



Lockdown routines are sticking

CHANGING HABITS

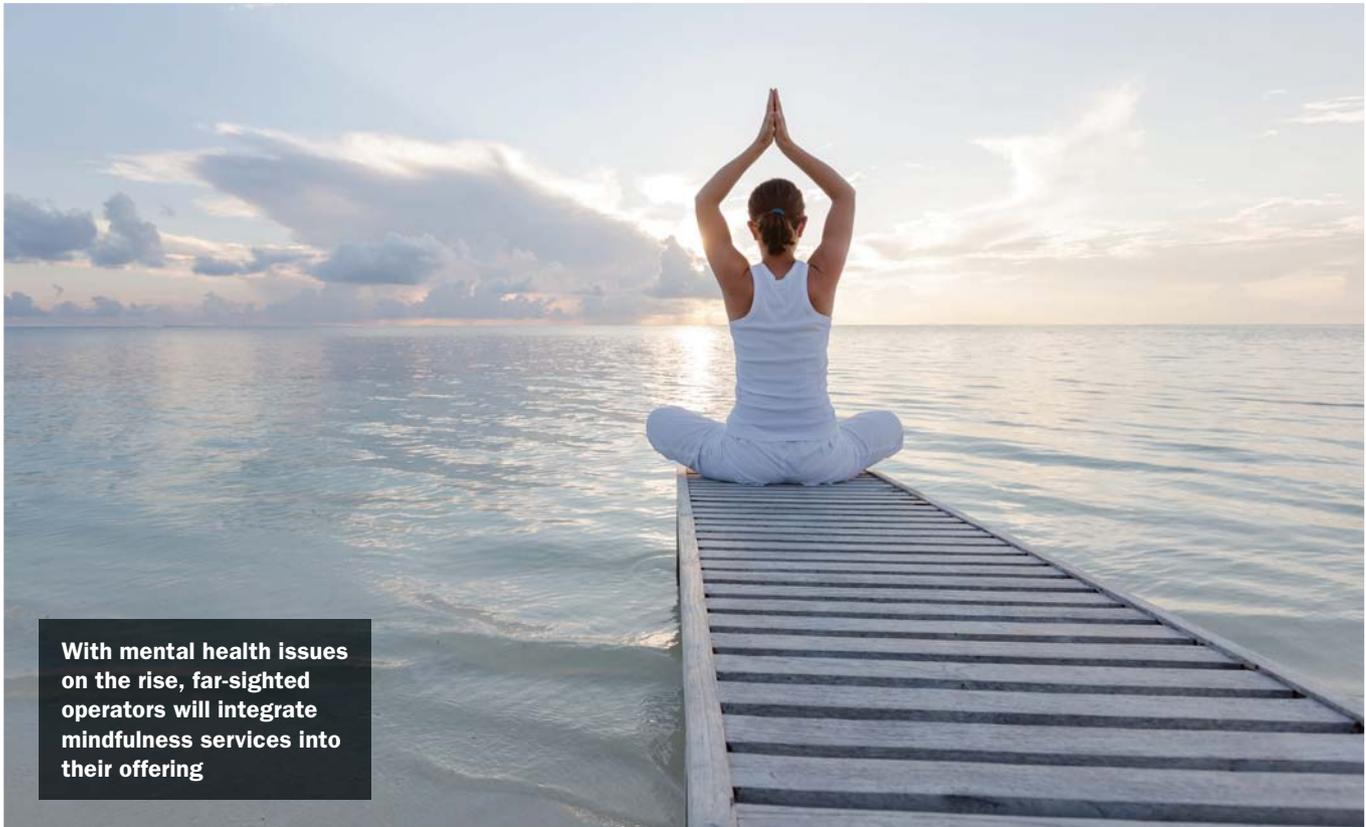
17. SNACKABLE WORKOUTS

The pandemic has disrupted people's daily routines and along with this their usual windows of time for workouts.

This has led to a rise in popularity of shorter, snackable workouts that can be squeezed into pockets of time between sleeping, Zoom meetings and homeschooling.

Some gyms are still running reduced workout slots to allow for additional cleaning time, cementing these routines and meaning the trend towards shorter workouts is likely to continue.

There is no evidence to suggest these workouts are any less intense. ▶



SHUTTERSTOCK/MY GOOD IMAGES

With mental health issues on the rise, far-sighted operators will integrate mindfulness services into their offering

WORKING THE MIND MUSCLE

18. MENTAL HEALTH AND BREATHWORK

Looking after our mental health has been on the radar for a few years, but the last year has really shone a light on the fact that people will need a lot more support and going forward, it will become a must-have.

More than 2,500 meditation apps have launched since 2015, but downloads sky-rocketed in 2020. With just over 28 million installs, Calm brought in \$99.4m in revenue, while Headspace generated an estimated \$64.5m. Clearly, there's a lot

of money in mindfulness - according to the Global Wellness Institute, the global mental wellness industry is worth \$121bn, with mindfulness accounting for \$2.9bn.

Operators shouldn't assume the big apps have cornered the market in this: there is a vast potential market out there of people with deconditioned minds, who could use help with dealing with stress, to help them sleep, manage the work-life balance and help them adopt healthier lifestyles.

We expect to see more operators integrating mindfulness into their operations, via meditation classes as well as bringing mindfulness into group ex workouts.

Pranayama and breathwork are also likely to grow in popularity, educating people how to make full use of their lungs. The English National Opera has collaborated with Imperial College Healthcare to help long Covid sufferers through breathing re-training via singing.

IMPROVING SERVICE

19. UPSELLING

It's difficult for health clubs to increase membership fees, so once capacity is reached in any location, the only way to drive growth is upselling members with new services that complement the existing offer.

As the industry matures and more institutional investors become involved, we expect to see an increased focus in this area.

Many operators are already offering premium membership packages including things such as body composition analysis, bring a friend, or multi-site offers, but more elaborate schemes can include home food deliveries, massages, childcare, laundry and concierge services, subscriptions for activewear and metabolic health testing (see trend 15). All can increase revenues while deepening member engagement.



SHUTTERSTOCK/MICROGEN

Members appreciate having a range of services on tap

HARNESSING THE PASSION

20. RUNNING

During the first lockdown, stories appeared in the mainstream media about people getting into running and not planning to return to their gym. Strava activity tripled its users and purchases of running gear increased by 243 per cent. But rather than being a threat, this is a trend operators can get on the back of and use to their advantage.

Running has been growing in popularity due to park running organisations and marathons are on the bucket list of many.

Research by Les Mills shows that strength training can improve running times, meaning there's an opportunity for gym operators to support members in achieving their running goals both in and out of the club.

We expect to see more operators launching running clubs, as well as treadmill training classes that combine running with workouts on the gym floor to improve times for those who compete and those who don't. See HCM issue 8 2021 for more details.



SHUTTERSTOCK/JACOB LUND

COVID is fuelling a running boom

HCM Fitness Trends archive

2020

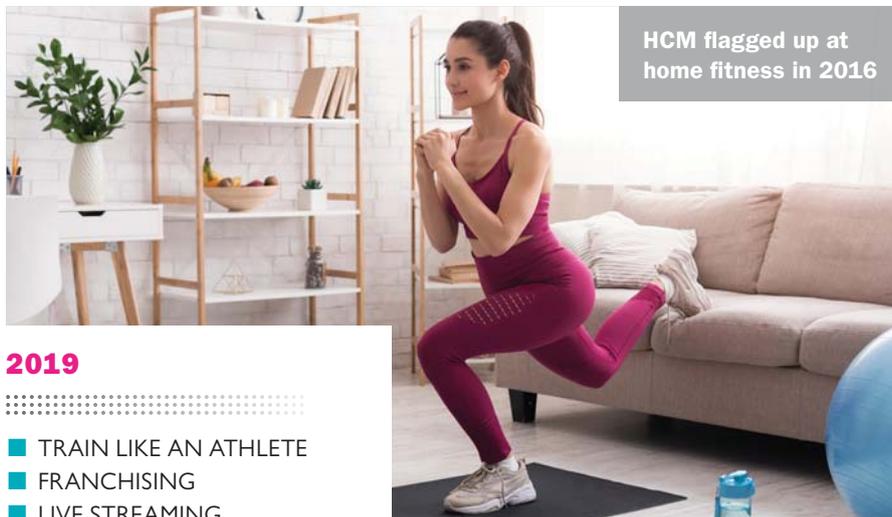
- OUTDOOR FITNESS
- PPE
- DIVERSIFICATION
- HYGIENE
- FIT TECH
- DISTANCING CONTROL
- BUTT WORKOUTS
- STRENGTH TRAINING
- PE
- PANDEMIC INSURANCE
- MENTAL HEALTH SUPPORT
- ELIMINATING MALE BIAS
- SWIMMING
- POST-EXERCISE HEAT
- CATERING FOR INTROVERTS
- TRIM TRAILS
- ECSOD
- OUTDOOR GYMS
- SENOLYTICS

ABOUT THE AUTHORS

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



Kath Hudson is a freelance journalist and copywriter, specialising in health and leisure, who has been writing across the Leisure Media titles since 1993.



HCM flagged up at home fitness in 2016

SHUTTERSTOCK/PROSTOCK-STUDIO

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

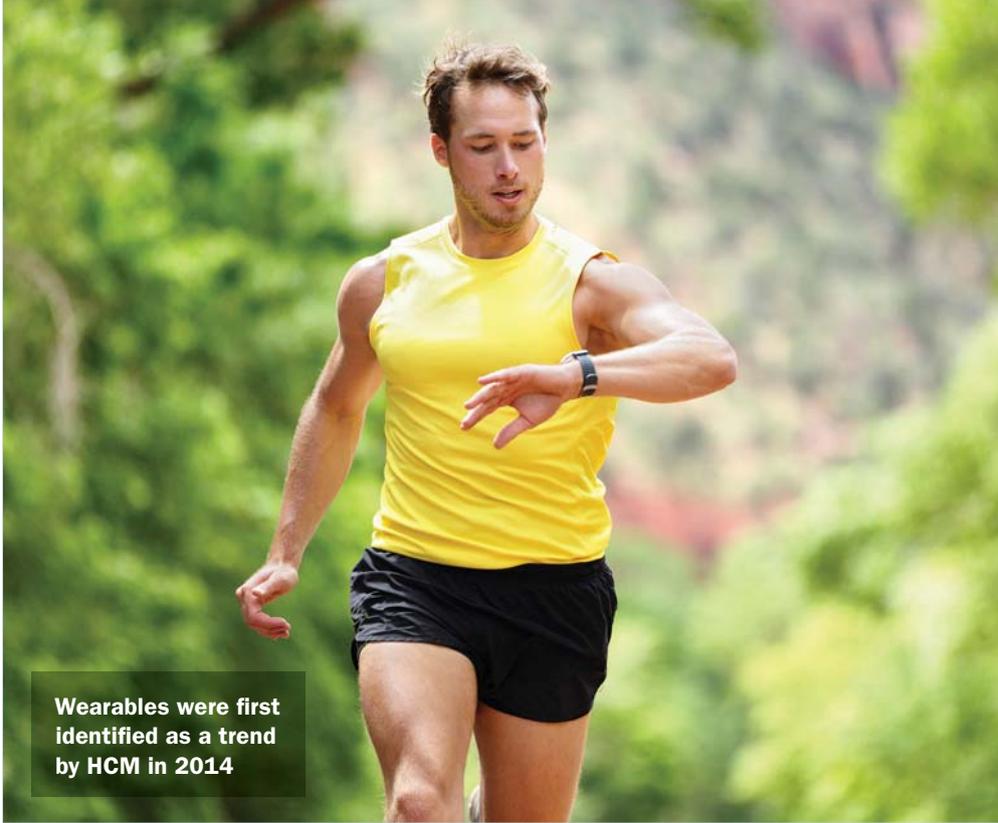
2018

- AUGMENTED REALITY
- EXERCISE SUPPLEMENTS
- FASCIA RELEASE
- SENSORY DEPRIVATION
- MENTAL FITNESS
- 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

PHOTO: SHUTTERSTOCK/MARIDAV



Wearables were first identified as a trend by HCM in 2014

2016

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

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



INSIGHTS

HCM

HANDBOOK

2021–2022

INDUSTRY INSIGHTS

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Phoenix rising	p44
Out the box	p48
New sensations	p54
On the road to recovery	p62
Powering back	p68

PREDICTIONS

HCM invited industry experts from around the world to warm up their crystal balls and share thoughts on what the next year will hold

PHOTO: DELOITTE



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There will always be demand for bricks and mortar fitness operators, because there are some types of training which just cannot be achieved online or at home to the same effect.

Alicia Whistlecroft

Assistant director
Deloitte corporate advisory

I anticipate people showing a renewed appreciation for their health and wellbeing and looking to increase the amount they exercise.

The industry has seen some membership attrition due to the anticipated economic challenges for consumers. This was probably less severe in the budget segment when compared to the mid-market and premium segments, as a consequence of the proportion of discretionary income the membership accounts for.

Many operators believe a large part of their initial attrition was from sleeping members. Since the start of the pandemic, businesses have been forced to explore ways of engaging more with customers which goes to the heart of the biggest challenge in the industry: minimising churn.

The quick pivot to adapt offerings, by developing digital content sharing platforms enabled operators to keep members engaged, which is expected to have a positive impact on customer retention figures going forwards.

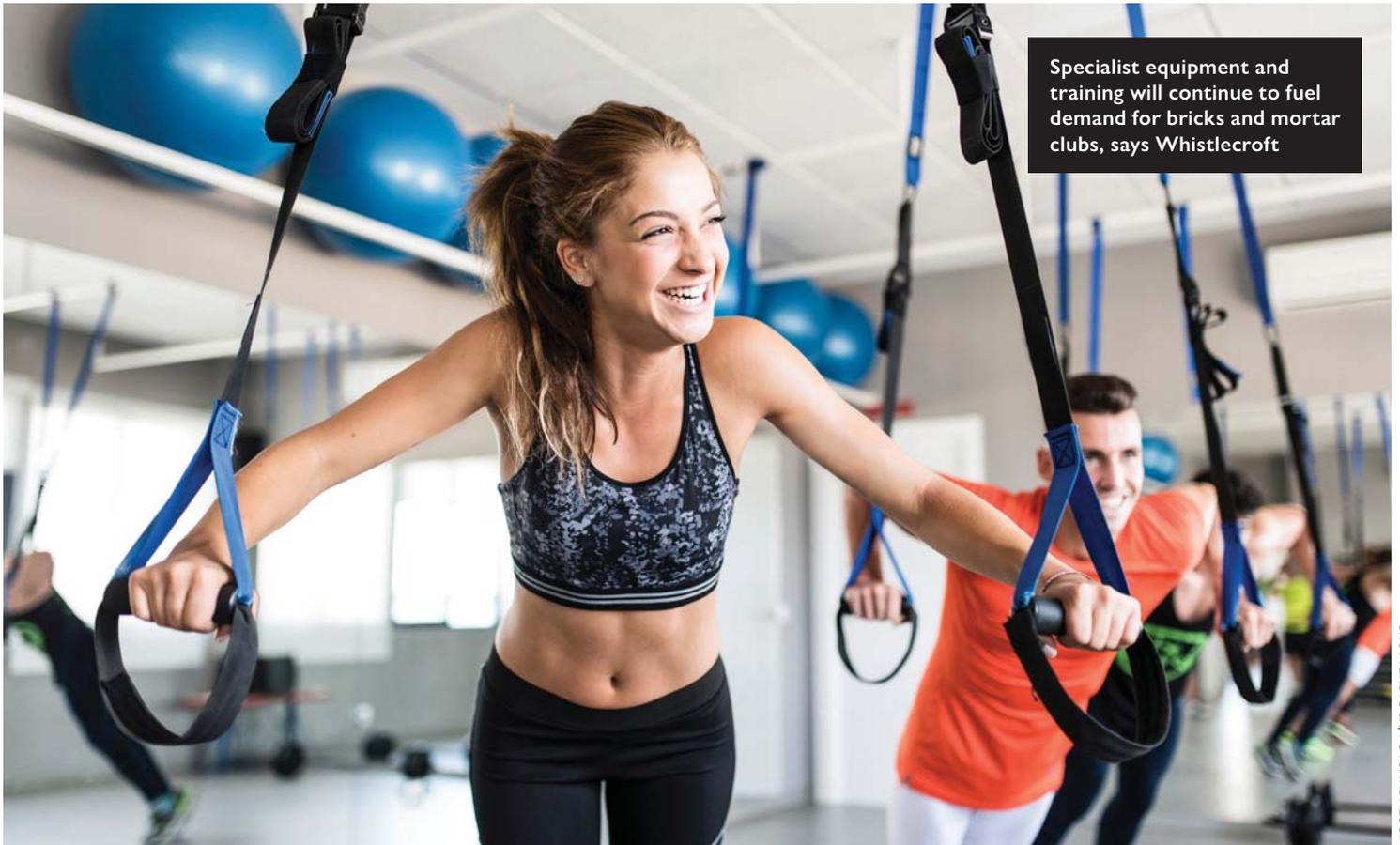
As the lockdowns reoccurred, several operators were able to introduce charges for their various online offerings, such as pay-as-you-go or new online subscriptions.

Nonetheless, the pandemic has put a huge financial strain on many UK operators, due to the large periods of 2020 where revenues were essentially zero. The initial hit on the industry signalled yet another downturn in the already squeezed mid-market and less focussed businesses, which resulted in a few distressed merger and acquisition processes last summer, including Xercise4less and DW Sports, largely from the rump of the mid-market sector.

Strong balance sheets

Operators who have been able to weather the storm the best are those who had strong balance sheets going into the pandemic and have been able to support their liquidity by negotiating rent holidays with landlords, business rates holidays and tax deferrals and using furlough.

Where operators are still liable for these payments, more distressed assets are likely to come to market as these amounts fall due. So it's likely we'll see more consolidation within the industry, as the disruption continues to



Specialist equipment and training will continue to fuel demand for bricks and mortar clubs, says Whistlecroft

SHUTTERSTOCK/FOTOANDALUCIA

exacerbate the prevailing issues affecting the mid-priced fitness segment.

Several operators have slowed or halted their rollout plans, while they focus on existing portfolios and seeing themselves through to the other side of the pandemic. So, while it's clear there will still be some opportune new site openings, some operators will delay significant roll-out plans until there's a clear roadmap to recovery.

The pandemic has opened people's eyes to the different approaches to training outside the gym. We've seen a huge increase in outdoor activity, such as running and cycling, as well as increased use of online digital content. Many operators have

realised these changes will have a lasting impact and are now diversifying to a hybrid offering, which will help to future-proof businesses and be popular with members.

The way ahead

There's still a firm view that even with the increased level of digitisation, there'll always be demand for bricks and mortar fitness operators, because there are some types of training which cannot be achieved online or at home to the same effect.

There is also a consensus that the action of physically going to a gym or studio helps people stay committed and motivated – people seem to find excuses at home.

In other sectors which have recovered strongly, we have seen a return to pre-COVID pricing and so we expect a strong bounce back in health and fitness.

Budget operators are likely to be among the first health and fitness businesses to recover and may benefit from customers trading down the pricing spectrum.

If operators take forward all the lessons learned since the start of the pandemic, as well as riding the anticipated interest in health and fitness as final restrictions are lifted, the sector should become an ever more vibrant, diverse and exciting segment for investment and development in the years to come. ▶

► Jay Ablondi

Executive vice president
of global products
IHRSA

Together, the health and fitness industry will emerge from this global pandemic with a renewed sense of purpose. As we have already witnessed in Asia, and other regions where clubs have reopened, members have flocked back to clubs to enjoy the camaraderie, support, sense of community, and experience that only they provide.

In some key health club markets, such as Tier 1 cities in China, participation is already surpassing the record levels reached in 2019. The demand for clubs is clearly there, as the pandemic has raised awareness of how important it is to take care of your health and make time for exercise and physical activity.

A number of lessons have been learned during this time which will have an impact on the industry going forward. We learned we're more effective together than apart. Although the pandemic had the power to divide, we created a united industry, which has given us a louder voice, and protected us from worse outcomes.

The pandemic is highlighting the importance of streamlining operations and managing costs. Many operators have reported making modifications which allow them to operate at a lower cost structure. Furthermore, while clubs were closed there was wide scale investment in air-purification systems and safety and cleaning measures, which will benefit members going forward.

Technology is here to stay and is going to be crucial to the long-term success of our industry. Many clubs did a phenomenal job of quickly transitioning



SHUTTERSTOCK/CRISPYPOPK

Asia was the first market to re-open and members flocked back to clubs



PHOTO:IHRSA

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Clubs which have done the best have been fully engaged with their members and communities and communicated their values and core beliefs

to online-only classes and beefed up their presence on social media, Zoom and other platforms to serve their communities beyond the four walls of the facility.

Clubs which have done the best during this time were fully engaged with their members and communities and communicated their business' values and core beliefs over and over. They made sure to let their members know by their actions – not just words – that the health and wellbeing of their community and employees was the most important factor driving their business decisions.

The pandemic has highlighted that we still have work to do to reverse decades of misperceptions about our industry and a lack of engagement with the healthcare and government communities. However, we are getting the message out that health clubs are essential and people are learning how important exercise is when it comes to improving overall health and strengthening one's immunity.



SHUTTERSTOCK/GORODENKOFF

Operators need to be sensitive to consumer demand and not force customers to make binary decisions

Simon Flint

CEO

Evolution Wellness

Since the start of the pandemic, the industry has done well to come together and collaborate for the good of all. We represented the facts intelligently and passionately in support of what we provide and presented a compelling case that we could operate safely under challenging circumstances.

Across the world, the industry lobbied and made new relationships with government officials, to channel our information in support of better outcomes. I'm convinced these efforts saved jobs and protected livelihoods across the sector.

Going forward, we need to build on this work to earn due respect for the industry, with tirelessly lobbying backed up by data to prove all the key points we want to make.

We still have a bumpy ride ahead of us, with more business closures, some consolidation and some changed consumer patterns which will take longer to unwind.

Some customers will be lost forever, as they settle in to different habits and

PHOTO: JUSTIN TIEW



Some customers will be lost forever, as they settle in to different habits and patterns. But equally, new customers will emerge to change the customer landscape.

patterns. But equally, new customers will emerge to change the customer landscape. It's likely the age of gym members will trend downwards in some markets, especially where digital engagement is at the front-end of the customer experience.

Fitness is booming and this will continue. As to how it is consumed, that's another story. I expect affluent, less economically disrupted markets will experience a surge, while some markets will take longer to limp back to recovery. Most of the action will be at the top and bottom of the price spectrum, with less happening in the middle.

Research during lockdown showed a significant slice of our membership base

was super keen to get back to the gym. Forty two per cent said: "I don't care what my first workout is, I just want to get back!" Others are more cautious and say they'll wait until they're fully vaccinated.

Many who have formed new habits – outdoors, online, gym at home – will find their own new normal. This poses both a challenge and an opportunity for operators to complement these choices, so as not to force consumers into a binary decision.

Some markets will swiftly bounce back almost to the old normal. Humans have an innate need for social contact and to feel good and we should continue to see the fruits of recently pent up demand. ▶

▶ Dave Stalker

**President
EuropeActive**

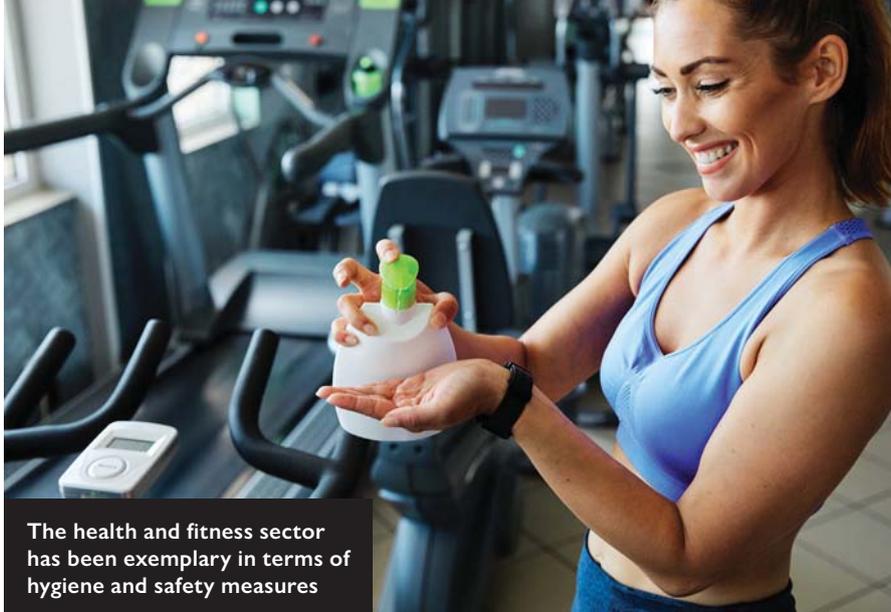
Despite 2020 being the most challenging year in our sector's history, some great initiatives were put together which resonated both at a European and at international level.

The move to reposition the sector towards public health is both exciting and daunting, but it's crucial we're perceived as an essential solution to this crisis.

Fitness representatives and experts should promote our responsibility to be providers of physical activity as a proven way of supporting social, physical and mental health and wellbeing.

Without exception, the people who make up our industry have risen to the task and I am truly proud of how they've embraced the challenges, united against a common enemy and steadfastly driven the industry forward. Operators' reaction in terms of hygiene and safety measures to guarantee fitness facilities are safe places to exercise has been exemplary.

It's of paramount importance that our sector continues to work together as a solid industry with the ambition of coming back stronger and to this end, EuropeActive has been developing Active Alliances with our national and trade associations, partners such as an MoU with ukactive, as well as building strong strategic partnerships with NGOs and commercial actors which support the vision of our Sectoral Manifesto – for example an extended partnership with FIBO – so we can ensure the most effective recovery of the fitness and physical activity sector with leaders and experts.



The health and fitness sector has been exemplary in terms of hygiene and safety measures

SHUTTERSTOCK/PIGSFIVE



PHOTO: JOHN HOOPER

It's of paramount importance that our sector continues to work together as a solid industry with the ambition of coming back stronger

A large part of the industry has been suffering significantly during this crisis, but the sector has proven to be flexible enough to adapt to the challenging circumstances through self-critical and creative thinking.

We'll need to keep reinventing ourselves through 2021 and into 2022 to successfully recover from the impact of COVID-19 and to redefine what we offer, in order to create an attractive business environment for our workforce.

Club operators have been able to adapt their business models and survive in the toughest situation they've faced so far. Being

fully committed to informing and assisting members, address vulnerabilities and repositioning themselves to make the most of the vast opportunities which will arise as we come out of the pandemic, will be the right pathway for operators to follow.

The EuropeActive Sectoral Manifesto *Horizon 2025* lays out four key priorities: working with the health sector, embracing digital, growing community and raising standards. All operators who embrace these in their mission and vision will be supporting the industry and will also undoubtedly reap the rewards.



Those who take part in group exercise stayed the most active during the lockdowns

Mike Hill

Co-owner
Leisure-net

Since the start of the pandemic, operators have had to think outside the box and this looks set to continue for the foreseeable future. However, at least now it's possible to start making long-term, sustainable plans, with the confidence most members will be keen to return.

Some people have started to make other exercise habits, but still our research reveals a strong appetite for returning to the gym and engaging with instructors. Sixty six per cent of the people we questioned rated the friendliness of staff as very important and 63 per cent said the support and guidance of the team is very important.

Making the gym environment safe was important to people, but the sector in the UK got this right following the first two lockdowns, with 69 per cent

of gym members saying they were confident about the protocols put in place. As the vaccination programme progresses, hopefully those who felt nervous, will regain confidence.

Going forward, there are three key areas for operators to focus on. Firstly, is creating confidence in customers around the systems, procedures and protocols put in place for dealing with COVID-19 and communicating to members gyms are proven to be safe, regulated environments.

Operators will also need to offer a more targeted service, with different sessions for segments of the market who want different things. The sector has shown an impressive pivot to digital and going forward will need to dovetail these services with their in-club offering in terms of operations and pricing.

For members who've found alternative ways to exercise, operators need to engage and prove how clubs can complement their new activities. For example, someone who's started cycling could power up hills better if they complement it with strength training.



PHOTO: JAMONKHOUSE



The sector has shown an impressive pivot to digital and going forward will need to dovetail these services with the in-club offering

Lockdown easing coinciding with good weather in Europe could delay the recovery due to people exercising outdoors, says Hollasch

Karsten Hollasch

Global private equity leader
Deloitte

The industry has learned valuable lessons and made adaptations which will help going forward. We have learned how to lobby effectively, as well as co-operate as a sector. In Germany, in addition to the fitness association, we have seen large rival operators join forces to run marketing campaigns to promote the industry and get across the message that clubs are safe environments. In 2021-22, the industry will need to do even more: speaking with one voice creates much more volume.

Digitalisation has become a must-have, not a nice-to-have, not just for virtual workouts, but in order to control capacity and track who's coming to the club. Arguably digitalisation should have happened years ago, but the pandemic has been a catalyst for huge leaps forward.

Annual or two-year contracts are the norm in Europe, so last year many operators were able to retain their members through a mixture of good communication and incentives.

However, at the start of 2021, European operators were hit by a double whammy of not being able to recruit new members in the most lucrative months of the year, and losing some of the members who joined in early 2020. While UK operators suffered



PHOTO: DELOITTE



Digitalisation has become a must-have, not a nice-to-have, not just for running virtual workouts, but in order to control capacity and track who's coming to the club

high attrition last year, European operators have more of this to face going forward.

People will come back to clubs, but I think it will take time before the industry recovers to 2019 levels. Lockdown easing coinciding with good weather in Europe means many people will have carried on exercising outdoors, which will delay the recovery.

SHUTTERSTOCK/NDAB CREATIVITY

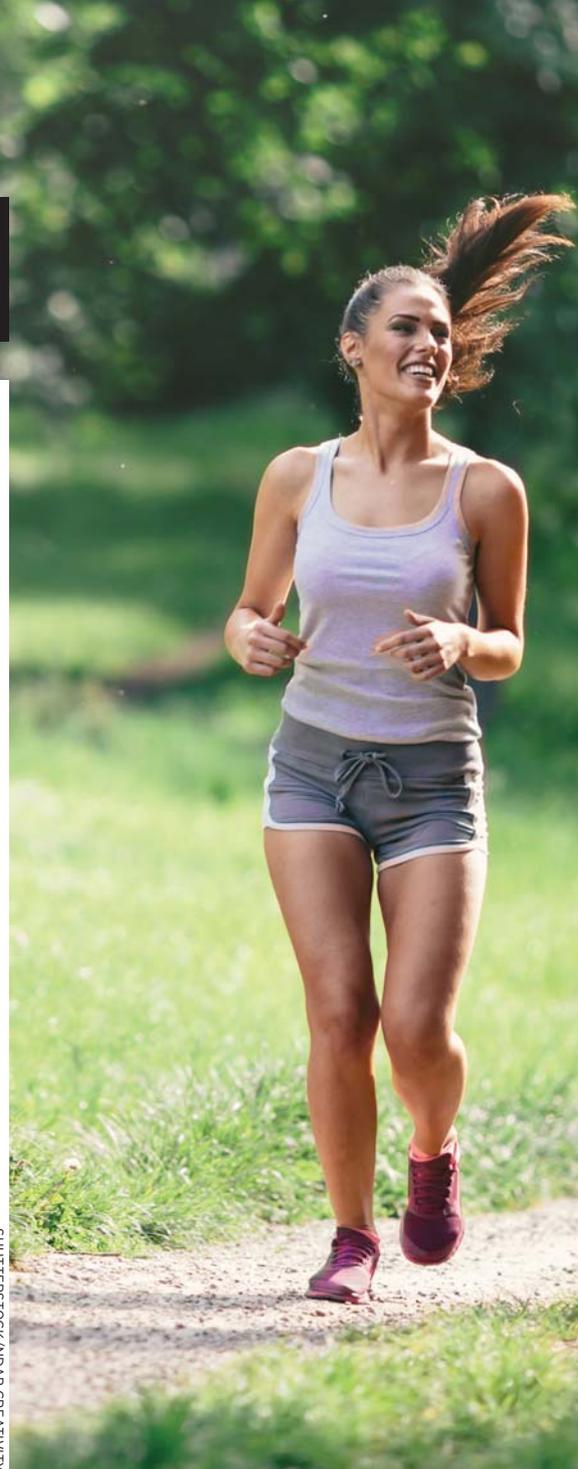




PHOTO: ANDREW BAKER



The role of leisure centres in promoting and supporting better health alongside the NHS in our communities is now obvious: we are an essential service

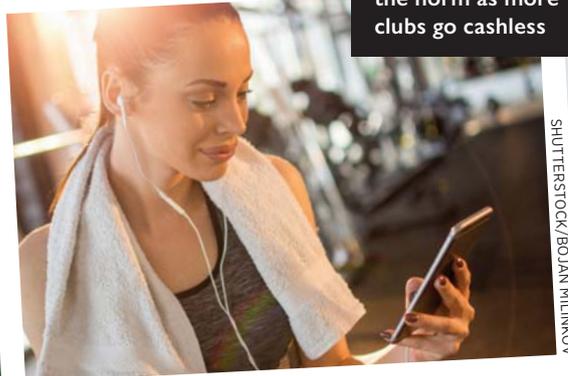
Mark Sesnan

Chief executive
GLL

No one in the UK local authority leisure contracting space would want to go back to where we were pre-COVID-19.

Public leisure centres had been dragged down a grubby route of 'least cost' by years of misplaced concepts of tendering and quasi commercialisation. We were thrown into a toxic environment, where often the only way of winning contracts was to go low price, despite many procurement exercises trying to dress this up with quality thresholds.

Apps will become the norm as more clubs go cashless



SHUTTERSTOCK/BOJANI MILINKOV

Not all, but most, local authorities have come good during the pandemic in so far as they have recognised the need to support and preserve their leisure assets for their community and have adopted an open book and partnership approach to the crisis.

This has enabled a real understanding of the issues in our industry to emerge for the first time, leading to a much more intelligent approach to how clients and contractors work in partnership as we move forward.

Inevitably there will be some fundamental changes to the public leisure offering. Older buildings which are uneconomic to run will have their demise accelerated, especially as carbon neutral ambitions are put into the mix. The switch to apps has enabled customer journeys to become the norm, with cash becoming largely extinct.

Customer experience will become even more important for all of us now we have raised expectations on cleanliness, bookings reliability and ease of accessibility. Prices may have to rise to cover higher costs.

The role of leisure centres in promoting and supporting better health alongside the NHS in our communities is now obvious: we are an essential service. I am optimistic our industry will emerge stronger and begin to be properly recognised for the vital role we play in promoting meaningful and enjoyable activity for all ages delivering better health outcomes for all and a better society for us all to enjoy.

Martyn Allison

Social change agent and influencer

The public sport and leisure sector is inevitably going to be reshaped by the pandemic just like every other part of the economy. My prediction is that it could be reduced by as much as 20 to 30 per cent depending how councils manage their own financial challenges.

My experience of the sector shows it handles change differently. One third will always relish the opportunity to change, reinvent itself, respond positively to the new landscape and build back better and fairer. A third will adapt more slowly and incrementally and will need to be encouraged and supported to adapt. But up to a third are likely to resist change and hang on to the hope that everything will get back to normal soon. It's this third that is most likely to disappear and it will not be part of the future.

The third which is likely to disappear is just as likely to be a private contractor, or a trust or an in house operator, because it is the quality of management and leadership in both the operator and the client council

PHOTO: MARTYN ALLISON



The challenge for councils and operators is how do they address these fundamental inequalities in health in contracts which have previously been less attractive for those in need, when councils face a huge financial crisis themselves

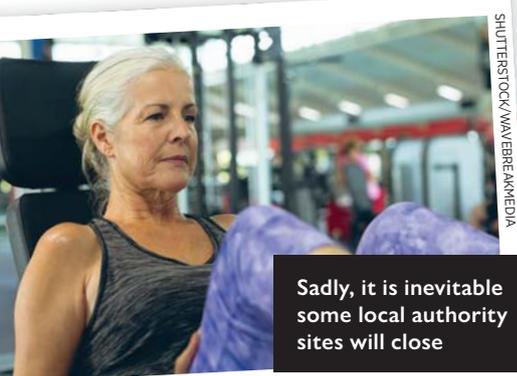
which will dictate the outcome. Unless councils see the value of their facilities rather than just the price, and operators can respond to the changing landscape I fear we will see significant closures.

The key question is which ones will be retained and which will disappear? Logic would suggest the big, new modern centres will survive and the older outdated ones will go. But this will depend on what councils wish to achieve with their facilities and how best their desired outcomes can



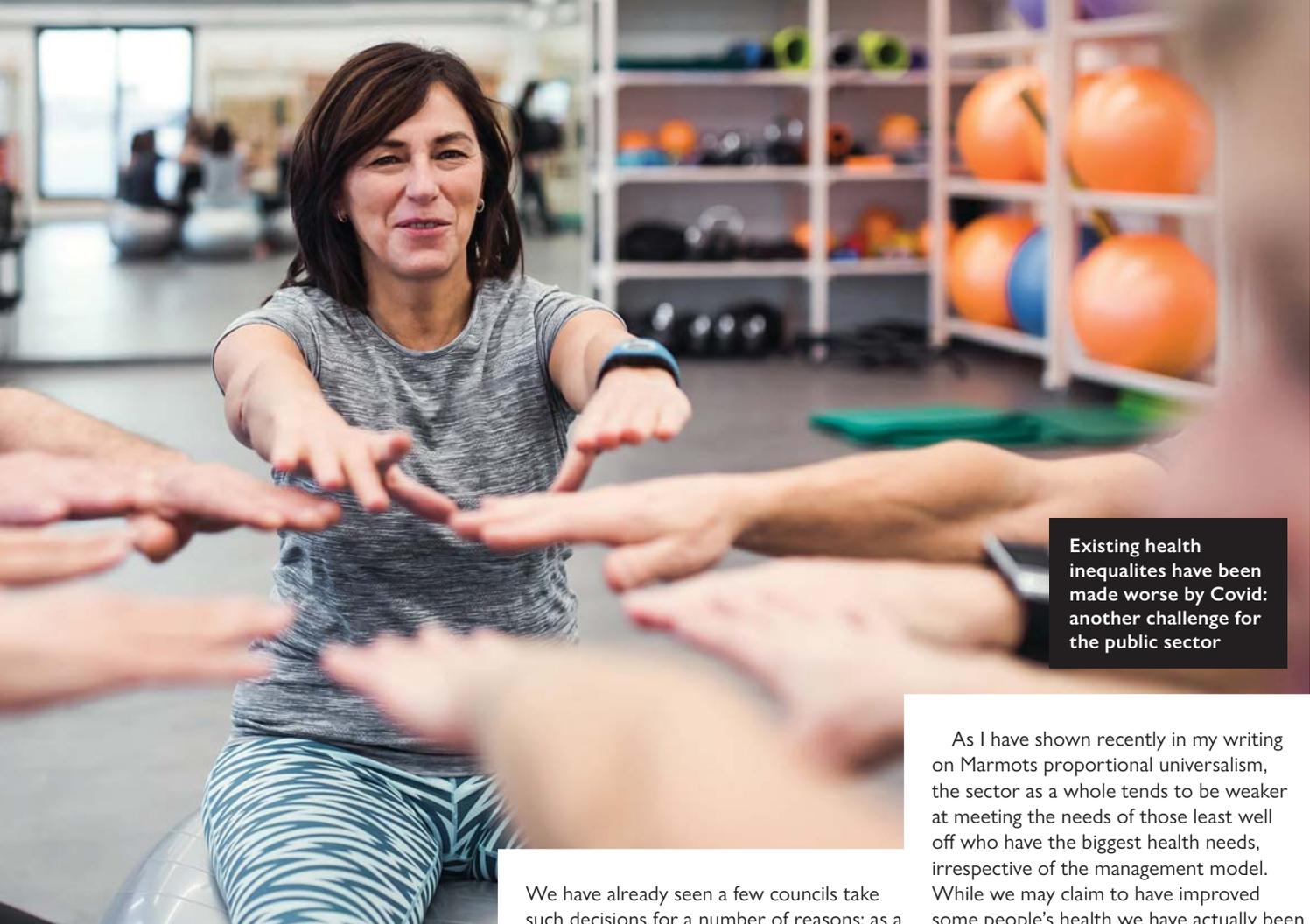
be delivered. Some councils for example may decide to sell or lease the glossy new ones to private providers and use the capital receipts or rental income to retain and improve the smaller community venues which are better at serving the more deprived communities.

I think the same rationalisation process will also generate more multi-service community hubs, focused more on health and wellbeing than sport and fitness. This could have some real challenges



SHUTTERSTOCK/WAVEBREA MEDIA

Sadly, it is inevitable some local authority sites will close



Existing health inequalities have been made worse by Covid: another challenge for the public sector

SHUTTERSTOCK/HALEPOINT

for traditional sport clubs, particularly swimming clubs, who could find themselves with less water space or having to take on the management of their own facilities. The rationalisation process could also see a rebalancing from indoor to more outdoor facilities and a greater reliance on digital access is certain.

Another response to recovery will be for councils to bring facilities back in house, either through direct management or by forming a local authority trading company.

We have already seen a few councils take such decisions for a number of reasons: as a response to a contract irrevocably breaking down with a management contractor or trust; the desire to simply take back more control, or as a temporary solution until the market settles back down and they can go back out to tender.

With health inequalities worsening before the pandemic and now made even worse by the pandemic many local authorities will need to think carefully about how they respond and better serve the needs of those in their community who were already most likely to be excluded and have fared the worst during Covid.

As I have shown recently in my writing on Marmots proportional universalism, the sector as a whole tends to be weaker at meeting the needs of those least well off who have the biggest health needs, irrespective of the management model.

While we may claim to have improved some people's health we have actually been making health inequalities worse. White, able males tend to be well served by all the management models, but families living with multiple deprivation are equally poorly served by them except for a socially minded trust and some in house services.

The challenge for councils and operators is how do they address these fundamental inequalities in health in contracts which have previously been less attractive for those in need, when councils face a huge financial crisis themselves. It is this situation which will need to be addressed in the recovery and it will not be easy. ●

let the good times roll



Massive pivots, lean operations, phygital clubs, Emma Barry looks back over the lessons learned in 2020 and predicts a boom time in the roaring twenties...

We're watching a technology revolution in real-time



PHOTO: ZAHIRINA ROBERTSON



Despite being closed, good studios retained their communities

“

What were the biggest lessons of 2020?

As any frisky start-up can attest, a forced accelerator will bring out the best and the worst. Some froze and closed. Others pivoted so hard it felt like a pirouette and revelled in a new world of limited resources with lashings of uncertainty.

New rules demanded a new playbook: we saw a new path to profit, a new clientele, new partners and new technology. Good studios retained their community: the relationship with members is still a massive advantage over Big Tech.

We're watching a technology revolution in real-time. While it was already coming, 2020 was the tipping point. Depending on which tech-expert you subscribe to, the acceleration during this forced pause is somewhere in the magnitude

Our job is to meet the market where the market is and create intoxicating solutions to motivate the unmotivated

of three to seven years, particularly in customer-facing efforts such as biometrics, gamification and more customisable software and CRM management.

There's been a flurry of M&A activity, rollups, bankruptcies and partnerships: RSG and Gold's, 1Rebel and Perks, Peloton and Precor and Beyonce, Box Union and Title Boxing Club, Equinox+ and Universal and Whoop and the who's who of fitness trekking to the Middle East.

What did the industry do well?

We put our arms around our communities and hung on for dear life. We were transparent in our communication, Zoomed, social holed, binged, went online with schedules, trained remotely, educated, called people, entertained, took things outdoors, dropped or eliminated pricing to meet the market where it was.

There was triple digit growth of cycle, treadmill and rower sales. Bodyweight



Every time we're restricted and forced to adopt a new perspective, we flourish

- ▶ workouts lasted about a month in the US, boxers got sick of hitting air and lifting backpacks and pets got old pretty quick.

We took it outdoors – all reconnecting with the delight and mental health value of being outside, feet in the earth, hands in the sky. Nature has a funny way of balancing things out and ten hours of Zoom calls is enough to drive anyone outside.

How can we take these lessons forward?

Thanks to associations in most countries fighting the good fight, fitness is now inextricably linked to natural human function, mental health and productivity.

It's a shame it took a pandemic to hurry this conversation. Our job is to meet the market where the market is and create intoxicating solutions to motivate the unmotivated, to address demographics other than the over-served millennial set. All touchpoints need to be re-examined: the brand, product and systems.

With skeleton staffing and seismic shifts in strategy, people have never been more important. Those still on the bus can't just be salespeople, they must be growth salespeople. The marketers' growth marketers. Expect channel shifts of top



talent who come from adjacent industries who have accelerated businesses before.

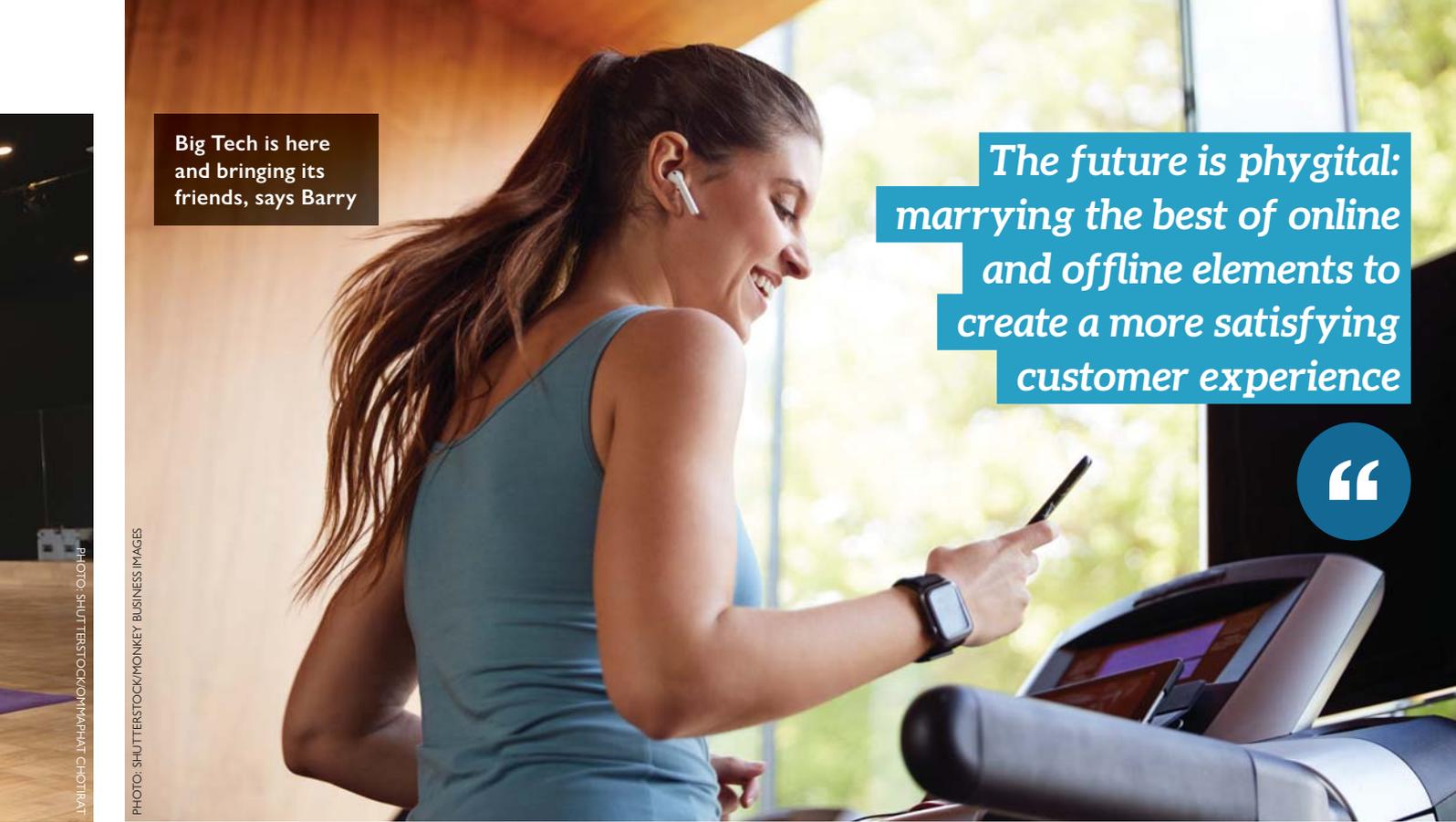
Given that the delineation between work and home has evaporated, what will now be our second space? We know from extensive workplace surveying that our needs when we come together are not about actually doing work, but collaborating, team building, exercising, sharing, in-person interactions which can't be done from home, entertaining and advancing the human creative condition.

What predictions do you have for the next year?

The future is phygital: marrying the best of online and offline elements to create a more satisfying customer experience.

Think omni-channel, hybrid, ecosystem, digital, online/offline strategy – all indicators and disruptors of worlds colliding digitally and in real life. We can all become fitness nomads, carrying the brands we care about in our pockets. Bold strides have been made: biometrics, gamification and connected experiences, leaderboards, social networking. Big Tech is here and bringing its friends. All lifestyle players are dealing a hand in the race for market share.

There are real gains to be made in real estate. Trophy downtown regions are saturated with fit-for-purpose, sound-proofed properties with luxe finishes, ready to expand or backfill, as the property market is pressured with the downturn of foot traffic in downtown areas and shifts



Big Tech is here
and bringing its
friends, says Barry

**The future is phygital:
marrying the best of online
and offline elements to
create a more satisfying
customer experience**

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PHOTO: SHUTTERSTOCK/MONKEY BUSINESS IMAGES
PHOTO: SHUTTERSTOCK/MANPHAT CHOTIRAT

in corporate culture, with a demand for worker flexibility, working from home and to meet the new work-life balance.

With so many new and geared up players, expect a proliferation of models, including pricing, adjacent industry learnings and new thought and funding to exploit the offerings.

As fitness sits in the broader ecosystem of what consumers do when they're not working, there are many opportunities to partner with ancillary businesses, products and services to create new synergies.

Investors are looking for resilience, but also growth and for businesses to be highly relevant, scalable and executionary in the new world. Expect profits on paper to be more firmly tested. Also expect big bets, as

illustrated by the recent three-way between Beachbody, MYX and Forest Road or TSG expanding to relaunch as to Xplor.

Can we expect a boomtime once vaccinations are well advanced?

Was there a baby boom after the last world war? Yes. Precisely. The very thing we're held from, draws us back. Every time we are restricted and forced to adopt a new perspective, we flourish. Add to that we're social beasts, made abundantly clear by our pack mentality.

The better question is will our behaviours change? And the answer is yes. Peloton and friends changed everything pre-pandemic, proving one could maintain deep and meaningful relationships with a

console which housed our trainers, our community and our programme. And in many ways, more potently because of the power of technology. Cue leaderboards, virtual shoutouts, biometric tracking, groups, challenges and social media.

Will the customer base of gyms change?

Yes. Those with a wake up call will also swipe in. More and more varied demographics will come, provided we make them feel welcome. The industry will enjoy an upswing of general activity with all these marketing dollars being pumped into our stratosphere and all the health and fitness apps and adjacent industries piling into our sector. ●

“

The UK fitness sector has been recession proof during 1980-81, 1990-91, 2008-09 however, the pandemic has given the sector an unprecedented shock which dwarfs any recession

When fitness went digital, home workouts jumped from an estimated 8 per cent to 53 per cent



PHOENIX RISING

David Minton, founder of The Leisure Database Company, talks about the impact of the pandemic on the sector and what's likely to come next

C OVID-19 opened a vast new space for individual responsibility which moved the focus onto daily movement, exercise, health improvement and wellbeing. Exercise became one of the few defined reasons people could leave their home during the lockdowns of 2020-21.

While the traditional sector lay closed or working at reduced capacity, home workouts jumped from an estimated 8 per cent to 53 per cent when fitness went digital. Outdoor exercise classes between lockdowns jumped more than 400 per cent and will remain popular for some time.

The new category of Connected Fitness took off: bundling hardware, software and a user experience captivating a growing audience. Three Connected Fitness unicorns were created in 2020 and more than \$1bn (£0.7bn, €0.8bn) was invested in this new category in just one year. Celebrities, sports people, brands, sites, instructors, keen amateurs and PTs all took to digital, some successfully monetising the new offering against a wash of free product.

An annus horribilis

Meanwhile, the traditional suppliers who once owned the industry lost a lot in their annus horribilis. The Leisure Database Company has trend data showing how the UK fitness sector has been recession proof during 1980-81, 1990-91, 2008-09 however, the pandemic has given the sector an unprecedented shock which dwarfs any recession.

No event has reduced occupancy levels to 65 per cent or less, no supplier or operator has modelled business being shuttered or hampered as in 2020.

The UK fitness industry private sector lost around £3.7bn (€4.3bn, \$5bn) and the public sector £1.4bn (€1.6bn, \$2bn).

Pre-virus, London was trending as hard as New York or Los Angeles, with around 16,000 boutique classes each week, where the top brands sold 10 class packages for between £180-£250 (€207-€287, \$250-\$347). The private fitness clubs had 15.2 per cent penetration rate across the capital and the average monthly direct debit across the 549 clubs was £66.43 (€76, \$92.) ▶



By 2031 more than 27 per cent of the population will be aged 70 plus, the industry can no longer ignore this huge percentage of the population

- ▶ The 271 public sector sites in the capital charged an average of £34.52 (€40, \$49) and achieved a 5.6 per cent penetration rate. Figures show how the rest of the country was having a fitainment moment, I was often quoted as saying that fitness was enjoying a 'golden period' with growth across all sectors.

The industry is expected to shrink in the short term – to what extent will be covered in our full audit, to be published in our next *State of the Fitness Industry Report*.

Change is the norm

A quick poll on Instagram and Twitter suggests the micro trends are transforming gatherings into on-demand platforms, but humans are, above all else, social animals, and the energies of cities comes from the gatherings. I, for one, couldn't wait to exercise with others and a badass instructor, and this is where the industry's power lies.



Sir David Attenborough is encouraging people to reconnect with nature each day

LEV RADIN/SHUTTERSTOCK.COM

Exercise for the masses could be the legacy of the pandemic, as we move from crisis to recovery. A year is a long time for habits to change and new ones to form. What we considered ground-breaking is ever evolving and merging into other sectors. Change should be considered the norm and hybrid exercise and movement is one of the consequences of lockdown.

Few scientists expect to see total eradication of the virus, so our thoughts need to turn to a self-charging hybrid-body approach to one's personal fitness. To paraphrase a supplier's tag line, your body is your machine. The population at large discovered COVID-needs-must activities which became the mother of invention for both strength, functional and cardio.

As we move from assessing and managing the complex series' of risks and daily monitoring of infections, reported cases, hospitalisations, deaths and the R number we need to embrace wellbeing.

Ambassadors such as Sir David Attenborough and Chris Packham are encouraging people to reconnect with nature in a ten-minute connection. All local authorities have waiting lists for allotments and developers are including communal grow gardens in new developments.

Fitness needs to look for spaces which can be repurposed to cater for green initiatives which researchers have found good for mental health and exercise.

The concept of green premiums will be promoted as the UK hosts the COP26 climate summit in Glasgow in November 2021. Pope Francis has said it's time to 'change course' and committed the Vatican to net zero emissions. Fitness brands and suppliers need to move in the same direction.

Catering for septugenarians

The Pontiff has also set an annual day, the fourth Sunday in July, to honour older people. COVID-19 hit the oldest hardest: three quarters of those who have died in the UK have been over 75. Currently less than 1 per cent of the population over 75 participate in sport or fitness.

The industry needs to rethink what it means to be old, when adults in this age bracket value their health and have accrued more wealth than any other age bracket. Seventy five is the new 65, or for some, 50 plus. By 2031 more than 27 per cent of the population will be aged 70 plus, the industry can no longer ignore this huge percentage of the population.



**The industry needs to
rethink what is old:
75 is now the new 65
or 50 plus for some**

There are around 11,900 local councils in the UK including town, parish, community, neighbourhood and village where we will see public health and wellness prioritised. Facilities embedded in these communities will lead the charge in empowering individuals to put their sedentary lifestyle behind them. I propose a new E-rating where E equals the overall exercise and indicator of the health of each neighbourhood. To administer the vaccine so successfully we needed a centralised organisation, in levelling up the health of the nation, we need the exact opposite.

COVID-19 is showing the NHS to be all powerful in thought and deed. The population applauding on Thursday evenings was emotional and unifying during the darker moments. Going forward exercise, movement and wellness needs to be linked to health and education and considered from cradle to grave.

It's time for a new mega trend of health and wellness. The convergence between fitness and health is here to stay and data will drive constant innovation in biodata.

The question is, when staying fit is the most important thing people can possibly do, how does the industry get the message across to the bulk of the population? ●

INDUSTRY INSIGHTS

In the past year, Cardio
Plein Air has seen demand
rise by 40 per cent



PHOTO: GROUPE J.P. COMMUNICATIONS VISUELLES



Out **the** Box

Outdoor gyms, yoga on the beach, marquees in car parks... In order to keep delivering to members, operators have been creative in using the great outdoors. Is this trend here to stay? Kath Hudson investigates

Although the move to outdoor exercise was made through necessity rather than choice, there are some solid reasons to make it a permanent offering. For those who enjoy being outside – and many members will have got used to exercising al fresco – it reduces the drop-off in visits during spring and summer. Sunshine gives a shot of vitamin D and the mood-boosting hormone, serotonin. When the days shorten, outdoor exercise can also help to ward off Seasonal Affective Disorder.

Going forward, The American Council on Exercise believes offering exercise in local parks and community spaces could broaden the reach of physical activity and reduce health inequalities. To this end, ACE

launched the #MovingTogetherOutside campaign in April 2021, calling on local and state governments to reduce restrictions on exercising in community spaces such as parks and schools, when they're not in other use.

Hamilton in New Zealand, is ahead of the curve in this respect. The city council has already launched a Play Strategy to encourage more residents to get physically active by regarding the outdoors as a place to play – investment will be channelled into creating more opportunities for outdoor exercise, such as walkways and cycle routes, as well as allowing community access into schools out of hours.

URBAN ADVENTURES

A number of fitness providers have been operating outside for a long time. BMF has been training people in parks since 1999, modifying workouts to use whatever environment and equipment is available, whether that be park benches, bodyweight or a partner's bodyweight.

StreetGym is another company which provides urban circuit training. Army veteran, John Watson Allison, is the

Outdoor exercise can help to ward off seasonal affective disorder, depression and anxiety as sunshine naturally increases mood-boosting hormone, serotonin

INDUSTRY INSIGHTS

- founder and says exercising outdoors is beneficial for mental health: “If you work in an office under artificial light all day it’s highly beneficial to get outdoors in natural light. It’s also about stimulating the mind: we take you on an urban adventure, running, jumping, crawling and weaving your way around the back streets.

“We typically identify a circular route of between 1.5 and two miles. Along the way we’ll stop to perform exercises at various iconic cool places before running on to the next spot. The senses are bombarded with welcome distractions which take you away from any stress you may have and it puts you in the now.”

QUEBEC, CANADA

Cardio Plein Air, which runs outdoor training sessions in 160 parks in Quebec, has seen demand increase by more than 40 per cent during the pandemic so far.



StreetGym uses urban furniture to create a fun workout

PHOTO: JOHN WATSON ALLISON STREETGYM

The senses are bombarded with welcome distractions, which take you away from any stress you may have and puts you in the now

“We say there’s no bad weather, just bad clothes,” says director of operations, Thibault Gonnet. “We find the connection with nature – in addition to the effect of training in a small group – overcomes the lowest temperatures in Quebec.”

Gonnet predicts outdoor exercise will be the main trend for the next few years. His advice on running classes outside is to use minimal equipment and cut the music: “Appreciate the sound of the wind or your footsteps in the grass,” he says.

BOUTIQUE SPACES

If you’re planning to run outdoor sessions in public spaces, check out there isn’t a charge to pay or a permit to get first. Wyre Council in Lancashire, UK, announced plans to charge PTs and fitness instructors to use council land for exercise sessions. Free for 2021, but costing £25 next year, the council says the charge is being implemented in order for it to check instructors are properly trained and insured to keep participants safe.

Rather than go off-site, some operators have set up permanent outdoor gyms, which offer unforgettable experiences in their own right.

Always at the cutting edge, Equinox+ has rustled up a boutique outdoor gym concept called In the Wild. The LA and New York gyms include a tented cardio area, a covered outdoor

class studio area, a regeneration zone, strength floor area and heaters to make workouts possible in the winter.

Equipment supplier, Escape Fitness, has noticed an increased interest in outdoor gym design during the last six months and has been involved with more than a dozen projects. “People have realised outdoor training is actually a great experience regardless of the time of year and outdoor training spaces are a complement to the gym itself as opposed to an either/or option” says co-founder, Matthew Januszek.

“These environments will continue to be part of the offering. More operators will see it as an investment to be incorporated into the model. We’ve seen an increase in people searching for sites with the capacity to build an outdoor space – an indication outdoor training is here to stay.”

PHOTO: JOHN WATSON ALLISON STREETGYM





Exercising outdoors is the ideal antidote to working at a desk under artificial light

How did operators get creative outdoors?

USING THE GROUNDS

Thanks to its tennis courts and green spaces, David Lloyd Leisure was able to erect marquees at 90 of its 99 clubs in March 2020, offering a broad range of classes as soon as outdoor exercise was permitted.

Having launched an outdoor group training concept called Battlebox, in 2019, DLL wasn't a stranger to fresh air group exercise, however, the pandemic has taken things to another level.

According to Michelle Dand, head of fitness products and programming, 130 marquees from 17 different suppliers across 80 locations were hired, providing a logistical challenge to set up. Added to this it can take the teams two hours every day to set up and take down equipment.

It has been worth it though. "The feedback has been excellent, with a 95 per cent satisfaction score," says Dand. "Members have told us how much they enjoy the classes. Even in chillier weather they find working out in fresh air invigorating."

Going forward, DLL will continue to expand Battlebox, as well as offering outdoor classes. "The pandemic has accelerated the trend for outdoor exercise and the closure of our indoor clubs has driven us to develop and adapt

We say there is no bad weather, just bad clothes. Several times a year we conduct conferences on how to dress for each season



PHOTO: PRESS ASSOCIATION

DLL's outdoor classes on tennis courts will remain a regular feature due to their popularity

► our programme to operate outdoors at pace," says Dand. "We plan to continue to offer an outdoor timetable in the future, particularly in warmer weather. It will also allow us to offer more choice and availability, as well as support social distancing in our clubs.

DLL is also responding to the running zeitgeist by launching running and walking clubs at a number of sites. "During lockdown we built up a fantastic Facebook community of runners and walkers, and our members have loved the new running and walking clubs," says Dand.



WORKING WITH PARTNERS

Third Space didn't have grounds to use for group exercise at its Canary Wharf and Tower Bridge sites, but spoke to the landlords about using the adjacent outdoor space for pop-ups. The first two opened at Canary Wharf, with Tower Bridge launching one week later.

"When the government's staged return announcement excluded a return to indoor instructor-led group exercise, we knew we'd have to be creative, as up to 50 per cent of our members love to attend our classes and wanted to return ASAP," says Third Space CEO, Colin Waggett. "So we developed three outdoor group exercise venues with our partner landlords."

Enclosed, with fully removable partition walls to fall within safety permissions under the guidance of UK Government and ukactive recommendations, the 200sq m venues were erected in the morning and taken down each night.

"There were multiple challenges," says Third Space MD, John Penny.

"Challenge number one was securing a design of quality which fits the Third Space brand – especially as outdoor marquees were in hot demand.

"They also had to be supported by a comprehensive wind safety management plan, which requires team training and lots of health and safety planning checks. This involved removing the correct side enclosures to meet the outdoor space rules and enforce safety based on wind direction. To recreate the experience also required us to overlay proper level gym rubber flooring inside."

The master trainers had to adapt their programming to suit layout and machine availability and be aware of sound restrictions. In addition to traditional sound system measures, Third Space worked with a silent headphone partner.

Booking facilities had to be created on the app and tested for efficient functionality and capacity management. Finally, all COVID-19 safety measures had to be trained and delivered by the team.



PHOTO: SILENT DISCO YOGA

Yogis were buzzing after being able to practise together on Fistral Beach, Newquay

GOING TO THE BEACH

After pivoting to a Zoom programme last year, Cornwall-based, yoga studio, Oceanflow Yoga, was desperate to get outside and offer group sessions at the earliest opportunity. From 12 April 2021, when the sun was shining, outdoor yoga sessions on the clifftops overlooking Fistral Beach were offered.

However, the team was keen to get back to larger events as soon as possible and on Easter weekend ran the first Silent Disco Yoga. With capacity capped at 200 the event quickly sold out. Another date was added, which was also a sell out.

Being one of the first events in the country with a large gathering of people, Oceanflow was fastidious about following the rules and modifying the offering to ensure the event was COVID-secure. “A lot went into the pre-planning, including a thorough risk assessment and several walk throughs on the beach in the days leading up to the event,” says co-founder, Tom Harvey. “The beach is a perfect

Les Mills’ advice on going outside:

- Any outdoor space can be converted: the car park or poolside
- Do a test run – sound carries differently outside so make sure your instructors have the equipment they need
- Make sure the outdoor sessions have a permanent place on the class timetable and that this is communicated to members
- Draw in new class participants by highlighting which classes complement outdoor sports or training events.
- Entice your members back with a motivating challenge or competition to build up their confidence and camaraderie as a group
- Remind members to stay hydrated and to wear sunscreen

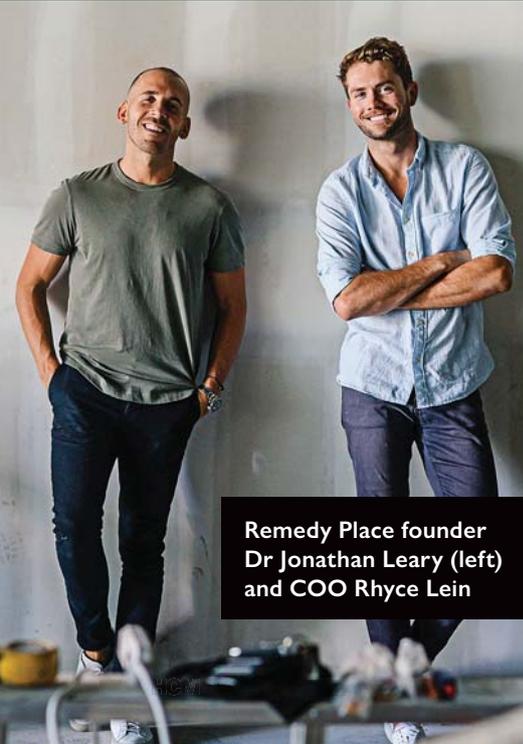
blank canvas in which we were easily able to rake out 2m spacing in the sand for the arrival queue all the way through the journey to the spacing of the yoga mats.

“But one thing we hadn’t anticipated was the changing sandbanks! We’d pre-planned everything from the location on the beach to the queuing system, only to have to change it all two days before, due to the tide depositing pebbles all over the area we had earmarked for the event. The beauty was that it created an even better sandy area at the same time, so our luck was in!”

Oceanflow Yoga co-founder, Jen Harvey, says it was a powerful experience for people to be able to practise yoga in a group again: “It’s hard to describe the energy surrounding the event. To have a large group of people meeting in a COVID-secure way was very emotional. Some people had just taken up yoga during lockdown, so had only ever practised in front of a screen. This experience on the beach with so many others blew their minds.” ●

NEW SENSATIONS

With gym doors closed across the world, staff furloughed, rollouts paused and income decimated, it wasn't a busy year for new openings. That's not to say there wasn't innovation. HCM looks at a few of the 2020 developments...



Remedy Place founder Dr Jonathan Leary (left) and COO Rhyce Lein

PHOTO: WWW.BANGASTUDIOS.CA GURKINDER BANGA, PM

Remedy Place

Fusing holistic health and preventative care

Believed to be the world's first social wellness club, Remedy Place opened its doors in LA in January, only to close again in March and open three months later under restrictions preventing it from offering its full suite of services.

The concept is the brainchild of Dr Jonathan Leary who, while working as a doctor in private practice, identified the need to create a healthy place to socialise alongside offering the latest in

preventative health care. (See interview HCM issue 4, page 14). His vision was that people would come to Remedy Place to celebrate their birthday with an ice bath and a meditation; or pop in after work for a revitalising juice in the lounge, or a lunchtime IV vitamin drip.

For those who can afford it, Remedy Place offers the opportunity to achieve optimum health. Popular services include acupuncture, cupping and functional



Believed to be the world's first social wellness club, Remedy Place mixes exercise and healthy socialising



PHOTOS: MADELINE TOLLE

I saw the trend coming for preventative care while I was running my practice, but the pandemic has pushed it forward even faster

PHOTO: MADELINE TOLLE

medicine: a series of blood panels and stool analysis, which show how every organ and system is functioning. This has been one of the most popular services.

"After getting all of this data, we can get a full understanding of what the body needs, which allows us to get to the root cause of what people are struggling with, whether that is brain fog, fatigue, aches and pains, auto immune conditions, or gut issues," says Leary. "Once we have

identified the problem, we then make a plan for nutrition and self care."

Leary says it was a crazy year to open a business and despite the fact they haven't been able to run events, use the bar and lounge, offer classes or corporate outings, it has still been a really successful year.

Why? Because the pandemic has made so many people focus on their health.

"This past year has pushed many people to a whole different level in terms of taking

care of themselves, as they realise health is their number one asset," says Leary. "I saw the trend for preventative care while I was running my practice, but the pandemic has pushed it forward even faster."

Work is currently underway on two more sites. Century City will open later this year, and a second site in LA either this year or next year. Next on the hit list are Austin, Miami and New York. London is also on the roadmap. ▶

BLOK

Ambitious pivot to on-line to create a global brand

BLOKtv had been in the pipeline for a couple of years but the pandemic fast tracked the process. “Fortunately we had employed a head of digital who arrived at the company the week before lockdown in March 2020,” says co-founder, Ed Stanbury. “So as soon as lockdown hit we made the decisions to go all in on digital and within six weeks created and launched blok-tv.com.”

Initially launched in May with a live timetable of 200 classes a week, people could either pay per class or unlimited monthly for £80 a month. This generated

enough revenue to support more than 100 of the freelance instructors with work during the lockdown.

However, when the second generation version was launched in September, BLOK wanted to move to a model which would be competitive in a global market, so the price point was reduced to £20 a month or £120 upfront for the year. More than 70 live classes and hundreds of on demand workouts are available each week.

“We are constantly adding new content and features,” says Stanbury. “The most common feedback we get is that users want more content, so we have more than a 1,000 on demand workouts currently in the pipeline, and are testing a range of new ways to broaden the live offering.

“Our digital product roadmap is hugely ambitious and includes a variety of social features to build connections with fellow users, as well as a number of product innovations unique to BLOK. These will be delivered gradually as we iterate the product continually over the coming months and years.

Almost one year after the launch, BLOKtv has achieved an impressive reach of 10,000 users in 150 countries, with an average of 36 per cent month on month growth since the launch of V2 and 203 per cent growth in the first quarter of 2021.

Going forward, Stanbury has plans to build a truly omnichannel business, with a global network of physical sites and virtual studios which seamlessly integrate with the digital platforms. To keep up with demand for new content, significant investment has



BLOK founder, Ed Stanbury, has been on a steep learning curve

PHOTO: BLOK

The most common feedback we get is that users want more content, so we have more than a 1,000 on demand workouts currently in the pipeline

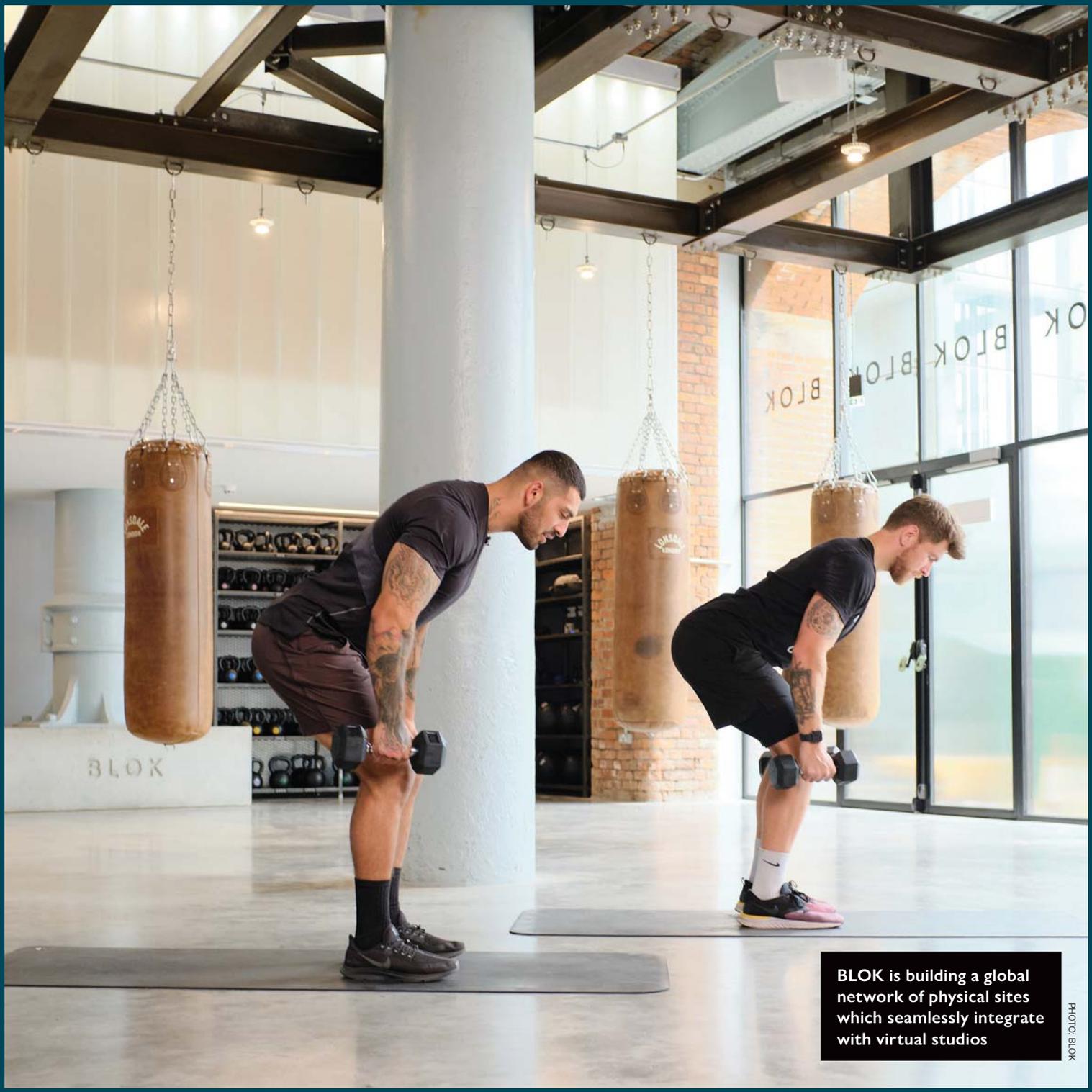
been made in computers, cameras, lighting and microphones, which are in all studios, as well as the bespoke broadcast studio.

“It’s been a steep learning curve,” says Stanbury. “As a non-tech founder pivoting into a tech world there is so much to learn, but the main thing I learned very quickly was that I needed to accept that I didn’t have the knowledge or the experience, and just be really open to learn and take advice. I’ve got a coach now, and have built a board of advisors, joined a club for tech founders, bought all the books (but not read many yet!) and I am incredibly excited about the journey ahead.”

BLOK’s swift pivot to online classes generated income for its freelance instructors



PHOTO: BLOK



BLOK is building a global network of physical sites which seamlessly integrate with virtual studios

PHOTO: BLOK

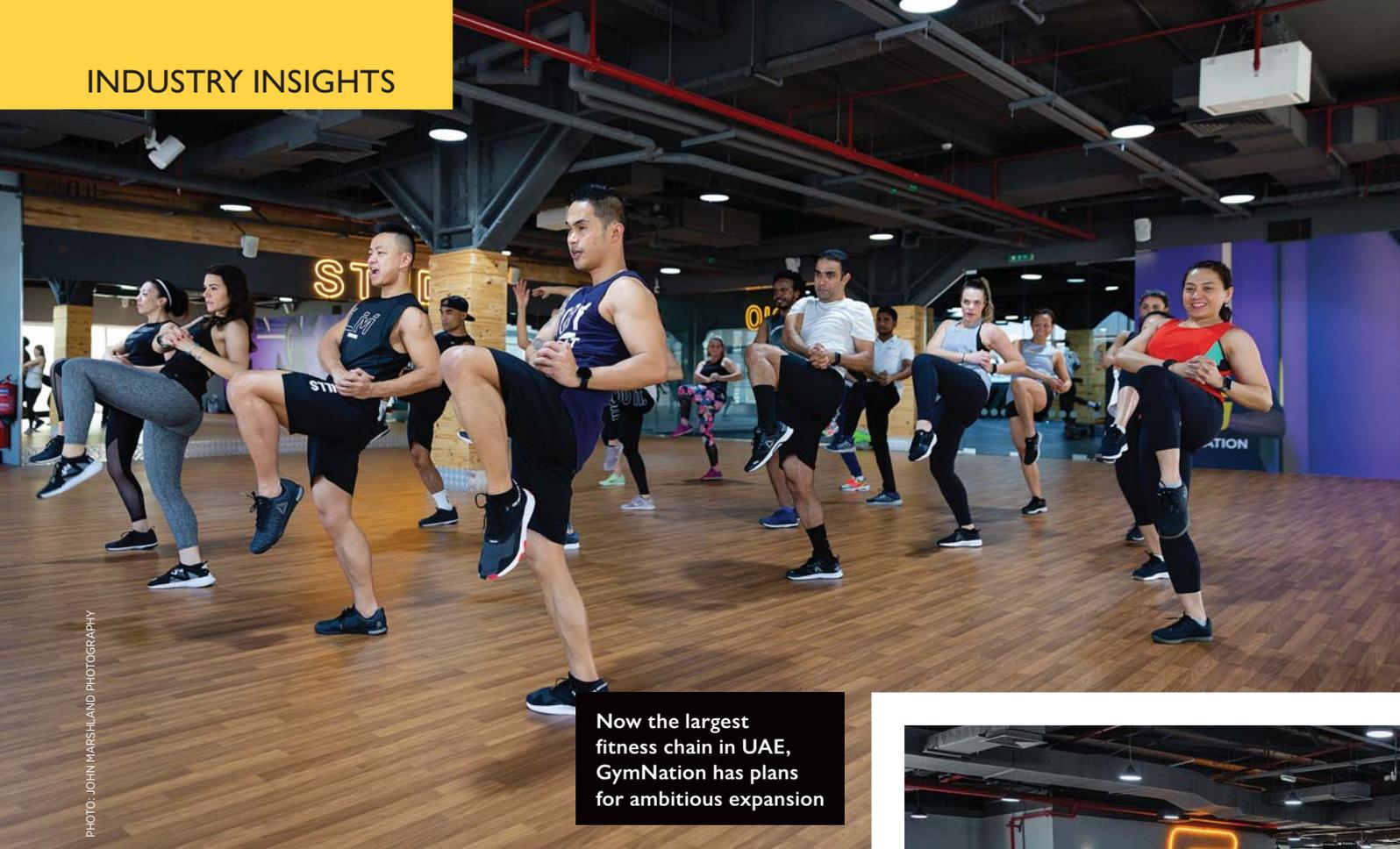


PHOTO: JOHN MARSHLAND PHOTOGRAPHY

Now the largest fitness chain in UAE, GymNation has plans for ambitious expansion

GymNation

First affordable fitness chain in UAE

After feeling priced out of the market when they moved to Dubai, a group of entrepreneurs – Loren Holland, Ant Martland and Frank Afeaki - decided to create the region's first low cost gym brand.

The first GymNation launched in 2018, and there are now seven GymNation locations across the UAE with a membership base fast approaching 50,000,

making it the largest fitness chain in the UAE. The company now has plans to open in each of the emirates and roll it out to Bahrain, Kuwait, Oman, Qatar and Saudi Arabia (see interview in HCM issue 8 2020)

According to a 2018 Deutsche Bank study, Dubai is the second most expensive city in the world for a gym membership. Costing £100-£150 a month, memberships are usually paid upfront for the year, making it prohibitively expensive for many.

GymNation offers memberships for just AED99(US\$27, €24, £21), while not skimping on the experience. Gym floors typically have around 500 pieces of Matrix kit, three or four studios including one





PHOTO: JOHN MARSHLAND PHOTOGRAPHY

Ant Martland, Loren Holland and Frank Afeaki: expats who co-founded GymNation



PHOTO: JOHN MARSHLAND PHOTOGRAPHY

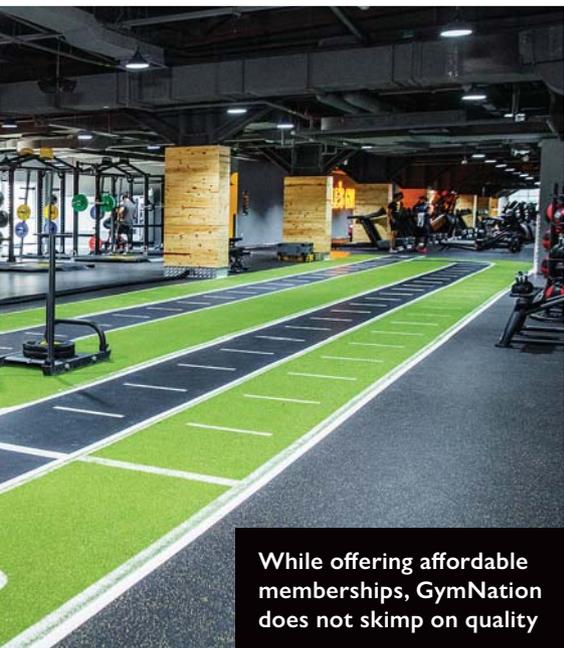


PHOTO: LIGHT HOUSE STUDIO, DUBAI

While offering affordable memberships, GymNation does not skimp on quality

GymNation isn't just a basic product for an affordable price tag. Ours are high quality gyms with a really cool vibe

that's dedicated to virtual with classes rolling back to back around the clock. Each club has a women-only gym.

"GymNation isn't just a basic product for an affordable price tag. Ours are high quality gyms with a really cool vibe," says Holland. "People accused us of being scam artists! They just didn't believe it could be done."

The reason the team are able to do this is the size of the clubs. At more than 30,000sq ft, they have massive capacity, even when allowing for social distancing. It's a no frills model and they've trimmed the costs by cutting out the high CapEX wet areas.

Club capacity is 10,000 members and they are masters of the pre-sales. "Before the gym opens we have two months' data collection and lead generation," says Martland. "We build the excitement to a specific date, like ticketing model for concerts. When we launched the pre-sales for the Abu Dhabi site, we made 2,200 transactions in 24 hours."

The team has plans to roll out across the Middle East, and is currently looking at opportunities in Saudi Arabia which has a market of 30 million people and the same problems as UAE in terms of expensive gym memberships and comparatively low sophistication among current operators.



Black Box aims to engage gamers to uplevel their lives and not just online

PHOTO: @FUDOUAHC



PHOTO: BLACK BOX

Preston Lewis is the co-founder of Black Box VR with Ryan DeLuca

Black Box

The world's first virtual reality gym

Combining HIIT and resistance training with the innovative tech of virtual reality and game design mechanics, the concept of Black Box is to use the addictive nature of gaming to trick people into exercising.

Co-founder, Preston Lewis, explains: "Bodies need to be tricked into sticking to a fitness programme – they are programmed to be efficient with calories and induce pain when we are pushing too hard. Working out is immediate pain and delayed reward; it lacks the feedback loops which are needed to encourage follow through. Not to mention the boredom!

"As the majority of people struggle with long-term adherence to their fitness programmes – it's literally hindering billions of people from living

Bodies need to be tricked into sticking to a fitness programme – they are programmed to be efficient with calories and induce pain when we are pushing too hard

the lives of their dreams - we thought that was a problem worth solving.”

Lewis says that game designers have figured out how to keep people unhealthily addicted to games: “People are effectively levelling up their game characters, but levelling down their actual lives, as they remain glued to the couch with Cheetos dust on their shirt.”

Black Box sets out to be the virtual reality game to level up people’s actual lives. The key to this is the patent-pending Dynamic Resistance Machine, which provides over 220lbs of resistance and acts as a controller in the VR workout experience.

When players step into a Black Box VR booth they see the machine. The two handles move up and down on the machine to allow for different fitness movements to be performed, such as squats, deadlifts, shoulder press and chest press among others.

Users put on arm tracking pucks and a VR headset, which takes them to a fully

immersive Black Box VR Battle Arena, where they can see their opponent and the crowd cheering them on. As they reach out to the virtual handles, they find the real handles on the machine. The resistance automatically calibrates to their strength and each exercise becomes an in game attack, for example shoulder presses allow users to hurl meteors at enemy units.

After each battle the AI crunches the number and delivers the performance to an app showing leaderboard rankings, calories and how they are building strength. Lewis says players enjoy seeing their stats.

The target market is 25- to 40-year-olds who want to build health and have an affinity for gaming. “They love that it scratches both the itch to compete and have fun in a gaming environment while reaping the health benefits,” says Lewis. “We think it’s clear combining VR gaming with fitness has the potential to decrease pain, increase enjoyment and allow players to push their bodies, creating real fitness gains over time.”

Currently there are six Black Box sites in the US: two in California, three in Arizona and one in Idaho. More are planned.



Players step into an immersive arena where crowds cheer them on

PHOTO: @FUDQAHIC

On the road to recovery

The health and fitness sector knows the vital role it plays in boosting immunity in the face of COVID-19. Now there's another opportunity to be an essential service: helping people recover from the virus. Kate Cracknell reports

One legacy of COVID-19 will be a long-term requirement to support those affected, by providing dedicated rehabilitation and support services.

The current medical guidance is for people to get back to their previous level of activity as soon as possible – even aiming to be more active.

At the moment, however, there's limited guidance around how to do this and with COVID-19 leaving some people with everything from Long COVID to undiagnosed heart conditions (see HCM October 2020, p76), developing expertise in this area is vital.

The physical activity sector has the chance to step up as an essential service, but we must upskill, absorb knowledge as new understanding of the virus continues to emerge and appreciate that a bespoke approach will be required when dealing with this cohort. We take a look at emerging initiatives from across the activity sector.



The physical activity sector has a vital role to play in immunity boosting and rehabilitation

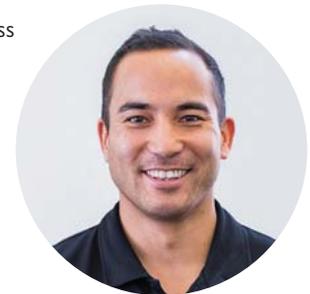
TenClinical, UK

The clinical division of boutique fitness provider Ten Health and Fitness, TenClinical was set up in 2018 as a clinical exercise rehab facility.

A Coronavirus Recovery programme has been designed, which sets out to reduce the impact of Long COVID, symptoms of which can include everything from diminished lung function, heart problems and muscular and joint disorders to chronic fatigue. COVID-19 can also exacerbate underlying health issues such as heart disease, diabetes, musculoskeletal and mental health conditions.

“Each Long COVID programme is designed around an individual client’s symptoms, condition, health and exercise history. It’s carefully prescribed, science-led and delivered and monitored on a one-to-one basis by qualified clinical exercise physiologists,” says Adam Hewitt, Ten’s head of clinical.

Plans vary but all include frequent assessments of pulmonary, cardiovascular and muscular strength and a prescribed exercise plan, including resistance and aerobic exercise. ●



“
For many people, the recovery period can be worse than the infection itself

Adam Hewitt

Jimenez is chief research & innovation officer at GOfit LAB & Professor at AWRC Sheffield



We're taking a scientific approach to developing an exercise prescription model for COVID recovery

Professor Alfonso Jimenez

GO fit, Spain & Portugal



PHOTO: PABLO TRIBELLO

We have academic collaborations around the world, but we wanted to go a bit deeper with the Advanced Wellbeing Research Centre (AWRC) in Sheffield, UK," says Steven Ward, chief transformation officer at GO fit. "One of our current R&D investments is the RICOVR project, which among other things is taking a scientific approach to developing an exercise prescription model for COVID recovery."

Professor Alfonso Jimenez is leading this project: "The work of the RICOVR unit, based at the AWRC, provides evidence of what works to support people recovering and rehabilitating from COVID-19," he explains. "We're particularly interested in supporting those with long COVID-19 symptoms, whose recovery journey is complex and non-linear."

"A further group of people living with long-term conditions, who have not contracted COVID-19, but whose physical and mental health may have deteriorated during lockdown, will also be supported through the research agenda of RICOVR."

"During lockdown, we introduced the GO fit Everywhere digital platform. It saw more than three million visits. That level of usage inspired gofit.tv, which launched last month. One of its key areas of content at the moment is COVID protection."

"Meanwhile, our app offers exercise programmes for members based on science, to be safe and effective."

"The four main programmes at the moment

address health challenges in the aftermath of COVID-19. There's a programme for sarcopenia, to help address muscle loss. There's another for weight loss, there's one for mental health. And there's also a programme to reinforce immune function."

"Members can follow these programmes at home and in our clubs, where we've also identified group exercise classes which support this approach and optimised our studio schedules around them."

"We're going further in the shape of 'GO fit 2.0', which launched in our new Madrid club in September and which we'll roll out as quickly as possible."

"This new model is all about counselling members across seven key areas of health, with exercise prescriptions tailored to the individual with a view to improving their Happiness Score. Embedded in this approach are new families of programmes, one of which is Life Recovery – and this, as the name suggests, includes COVID recovery."

"All of this is complemented by high-quality educational materials which help members to understand why they should do all of this – how exercise helps their immune function, for example. It helps people commit to change." ●

Nuffield Health, UK

Nuffield Health has created a 12-week rehabilitation programme to support COVID-19 patients in their recovery. Blending physical therapy – including exercise – with mental health support, the programme is being piloted in partnership with Manchester University NHS Foundation Trust, with the trust having referred all patients involved in the pilot.

Following an initial online triage, conducted by a specially trained Nuffield Health physiotherapist, the programme involves a recovery plan for every participant, as well as personalised advice from a rehab specialist.

The 12-week programme starts with six weeks of virtual, at-home exercise, followed by a further six weeks within a Nuffield Health fitness and wellbeing centre. Patients also receive access to on-demand workouts, weekly support calls and are part of a cohort of participants with whom to share their experiences.

“We know some patients are going to need specialist support for their rehabilitation,” says Dr Davina Deniszczyk, charity and medical director at Nuffield Health. “Evidence from previous epidemics, such as SARS and MERS, shows it can take years for some patients to recover. However, many



Patients receive access to workouts

NUFFIELD HEALTH, UK



Many COVID-19 patients are being discharged with no formal recovery plan. We believe this is likely to result in prolonged side-effects

Dr Davina Deniszczyk

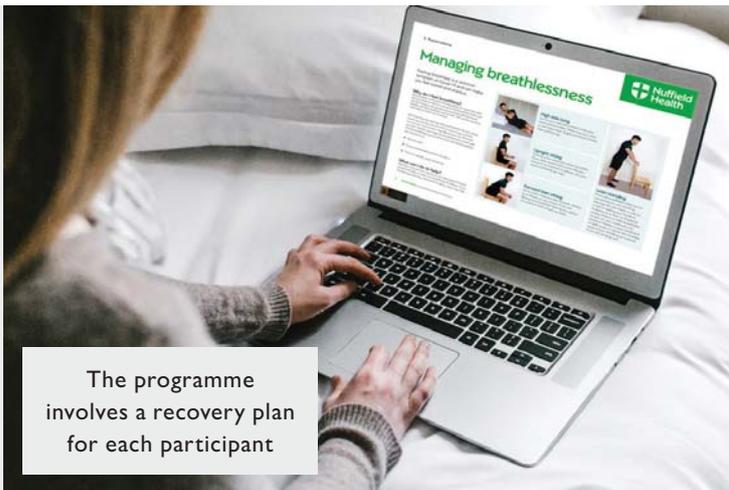


DEANWHITING.COM

COVID-19 patients are being discharged from hospital with no formal recovery plan. We believe this is likely to result in a longer recovery process and prolonged side-effects.

“Nuffield is in a unique position in the fitness sector to use its broad range of expertise across clinical, fitness and mental health to develop a programme to support the nation as it recovers from COVID-19.

“We’ll be capturing data throughout the pilot – specifically at weeks zero, six and 12 – to measure outcomes and evaluate the success of the programme. We’ll then use these learnings to build and develop a national programme, sharing the data with the NHS and other healthcare providers.” ●



The programme involves a recovery plan for each participant

NUFFIELD HEALTH, UK



SPORT FOR CONFIDENCE, UK

The recovery groups have continued through lockdown with up to eight participants



Support groups that have to be delivered in person can continue with up to 15 participants



Megan Potts

Sport For Confidence, UK

Sport For Confidence – an organisation which places health professionals into leisure centres to support and deliver physical activity to anyone facing barriers to participation – has been successfully running COVID Recovery walking groups, even through lockdown.

“Support groups which have to be delivered in person – either formally organised to provide mutual aid, therapy or any other form of support – can continue, with up to 15 participants, provided they take place at a premises other than a private home,” explains Sport For Confidence occupational therapist and session leader Megan Potts. “We have, however, chosen to reduce our numbers to eight per group, to make social distancing easier.” The walking groups are taking place across Essex, with



SPORT FOR CONFIDENCE, UK



a total of five currently in operation. “The groups were launched to support marginalised individuals recovering from the COVID-19 infection, or the wider effects of COVID-19, such as social isolation or deconditioning,” explains Potts. “Creating a regular opportunity to be active, while also enjoying the company of others, helps restore balance to people’s lives.”

Since September 2020, one group has further boosted engagement and motivation by adopting Street Tag, the gamified healthy lifestyle app that rewards participation. “Street Tag adds interest to our walks, as groups can compete against other local teams,” says Potts. “It also rewards activity outside the walking group, which encourages individuals to be independently active.” The walking group is part of the Prevention and Enablement Model, an initiative funded by Essex County Council Adult Social Care and Active Essex, to prevent the worsening of medical conditions and reduce the burden on local health services. ●

Life Leisure, UK

LIFE LEISURE, UK



Helping people pace their recovery is an important part of what we do

Michelle Childs

“**A**round July of last year, conscious there were going to be a lot of people with post-COVID needs, our exercise referral team began consulting with medical experts across Stockport – GPs, ICU doctors, respiratory consultants,” says Michelle Childs, health development manager at Life Leisure. “The result was the creation of a COVID Recovery Pack – funded by Stockport Council as part of the Stockport Moving Together initiative – which was simple for instructors to deliver to patients, even in the case of a further lockdown. Comprising a pedal exerciser, three levels of resistance band and some information on recovery, these packs were dropped off at the houses of those in need, with each recipient teamed up with a Life Leisure referral coach.”

“Drawing on their experience of working with conditions such as COPD, chronic fatigue and fibromyalgia, as well as those recovering from heart attack, our coaches have been guiding people through exercise recommendations either in-person in the park, or else via Zoom and WhatsApp,” says Childs. “We’ve been working to help people along their very individual recovery paths. Rebuilding strength has been hugely important and making progress provides a boost to their mental wellbeing. ●”

We aim to give teams the confidence to deal with those suffering from long COVID or the after-effects of COVID

Elaine Briggs

Future Fit, UK

FUTURE FIT, UK



“**I**n February 2020, we started working with GM Active on a skills academy for its entire workforce,” says Elaine Briggs, director of education at Future Fit. “Then along came COVID-19 and added another requirement to the mix. Just three days into the first lockdown, GM Active was looking at what would be needed to upskill its staff to help those recovering from the virus. “The clinical exercise R&D team at Future Fit, led by Anthony Crozier, got to work, in collaboration with the GM Active health promotion team, to develop a

COVID-19 recovery programme. The result is an educational programme – which we’ll continue to update as more studies come out – which aims to give teams the confidence to deal with those suffering from Long COVID or the after-effects of COVID-19.”
The first unit of the course provides an introduction to COVID-19. The second focuses on rehab, including communication, recognising when it’s safe to exercise, monitoring breathlessness, behaviour change, exercise guidance and coping strategies. The third and final unit equips learners to apply their knowledge, covering health screening, exercise testing and prescription, fatigue management, and the services available for additional support if needed. ●”



Dr Colin Robertson
is leading the
CAWS programmes

CAWS, UK

Formulated in May 2020 by education company CAWS, Rebuild, Rebound and Fortitude are short courses which train people to deliver a range of interventions designed for a 'continuum of needs' from COVID-19 rehabilitation, to working with vulnerable individuals with chronic disease.

"The concepts and principles which a coach or trainer will learn through this process has significant real-life application and is a segue to managing all clients with chronic disease, either pre-existing or brought on by COVID-19," says CAWS MD, Mel Spooner.

Rebuild – which focuses on teaching trainers and coaches to rehabilitate individuals who previously contracted COVID-19, or who are suffering with Long COVID – has been gaining traction across the fitness sector.

Premier Global NASM provides access to Rebuild as part of its PT diplomas programme, with learners given access to the CAWS platform.

ukactive, EuropeActive, CIMSPA and EREPS are also all supporting the course. Launched in November 2020, Rebuild is being used by a number of operators, from Places



Our motivation was less a perceived opportunity and more a sense of obligation

Dr Colin Robertson

industry brace and prepare for what could be seen coming over the horizon from the very outset of the crisis.

"A significant aspect of effective recovery from COVID-19 is managing the pace of rehabilitation and return to activity," says Spooner. "That's difficult for an individual to self-manage without understanding effective progress markers, exercise physiology and the pathology of COVID-19.

"Our sector is able to step in and handle this. As a profession, we have the club infrastructure and the workforce to deliver the complete rehabilitation of someone from COVID-19, following their acute phase and beyond." ●

Leisure – with whom CAWS is working to develop healthy community pathways – to Village Hotels and 3d Leisure.

Programmes are led by CAWS education director, Dr Colin Robertson, an exercise physiologist and clinical researcher who specialises in managing disease through physical activity, exercise and nutrition. Robertson also works on cancer and diabetes interventions.

"Our motivation for creating Rebuild was less a perceived opportunity and more a sense of obligation," he explains. "We wanted to help the

POWERING BACK

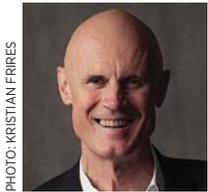


PHOTO: KRISTIAN FRIESES

How will digital, gyms and live fitness mesh to create a new customer offering in health clubs? Phillip Mills, executive director of Les Mills, shares his views

Amid media scare stories that the COVID-inspired home fitness boom would spell the end of fitness facilities, it's encouraging to see that since the re-opening there has been a strong appetite for members returning to their gyms.

An October 2020 IHRSA report found that 95 per cent of members missed at least one aspect of their club and more than half were dissatisfied with their lockdown fitness routines. The first to re-open, operators in China, Japan, and the UAE reported rapid recoveries when they came out of lockdown.

"Since reopening our sites in June and July, we've seen a massive rush from members eager to get back into the club and we're pretty much back to pre-COVID attendance levels," says Ant Martland, co-founder and marketing director of fast-growing UAE chain, GymNation.

"Group fitness and the power of our club communities have really shone through

and we think this will be a key component in the wider industry's recovery. Having been locked up and isolated for so long, people can't wait to get back to the thrill of a buzzing live class and we've got members in [socially distanced] queues at the studio door early to secure their space. People are desperate to get back to working out in groups and the past few months have been the best new sales period we've ever had."

Gyms on the rise

Many have predicted the rise of at-home digital fitness will cannibalise health club memberships, but the numbers don't bear this out.

Before COVID-19, around 85 per cent of gym members were already doing workouts at home (Qualtrix, 2019), illustrating the importance of delivering all types of fitness experiences if a club is to inspire loyalty.

As the digital fitness revolution has gathered pace in recent years, gym memberships and penetration rates have

still continued to increase. Europe – a market that's been an early adopter of digital fitness – witnessed club member growth of 66 per cent from 2009-2019.

Indeed, with an estimated 375,000 fitness apps in existence, and 77,000 launching in 2020 alone (Source: App Annie), the evidence suggests digital fitness is bringing more people into the world of workouts.

Gym operators also tackled the challenge of COVID-19 with impressive agility, implementing digital workout solutions in a matter of weeks.

With ClubIntel reporting that 72 per cent of global operators now offer on-demand and livestream workouts for members (up from just 25 per cent in 2019), clubs have clearly made substantial progress in a short space of time.

In many ways, the pandemic hastened changes that we, as operators, needed to make anyway.

By taking the club experience into people's homes, operators have the chance to reach huge swathes of the population who wouldn't typically visit a club and help them start their fitness journey. Standalone digital solutions such as livestream and on-demand can be a great way for clubs to win new fans online, build brand affinity, and eventually convert them into full members.

According to 2020 research from Alliance Leisure, 96 per cent of consumers

“An October 2020 IHRSA report found 95% of members miss at least one aspect of their club and more than half are dissatisfied with their lockdown fitness routines”



The social and motivational benefits will encourage people to return, says Mills

Being fit = better vaccine outcomes

Maintaining a steady flow of stories on the safety of gyms will be key to addressing concerns and influencing policy around COVID-19 restrictions, but we should also highlight our impact on the vaccination effort.

Several studies have suggested that exercise can help boost the efficacy of vaccinations. A University of Birmingham (UK) study showed people who exercised their arms for a few hours before a flu jab developed a stronger immune response, while a study from Germany's Saarland University found that elite athletes showed a more pronounced immune response to flu jabs, suggesting the fitter you are, the more effective your vaccine will be.

- ▶ who tried a workout from a club during lockdown said they would use that facility when it reopened. Meanwhile, a November 2020 survey of 9,000 Les Mills On Demand (LMOD) users found 63 per cent of non-gym members are interested in trying live Les Mills classes in a club.

Clubs drive motivation

Gym members are on average 14 times more active than non-members. This is partly due to practicality – most people don't have the space, money or equipment for a replicable home workout – but the most compelling reason is that clubs don't just serve up fitness, they provide motivation.

Motivation remains essential for regular exercise adherence, and two of the most powerful motivators are the accountability and sense of connection we get from working out with others. It's why our people remain our clubs' biggest assets, and why social fitness experiences hold the key to a rapid recovery.

“Instructors hold the hearts of members more than anyone else in the club and this is needed now more than ever”

Carrie Kepple, chair of IHRSA

The aim is to get back to full memberships – and beyond – as quickly as possible, but there's no going back in terms of how we operate. Digital is now a key pillar of success and it's the combination of this, with live workouts, which will give clubs the edge over digital-only offerings.

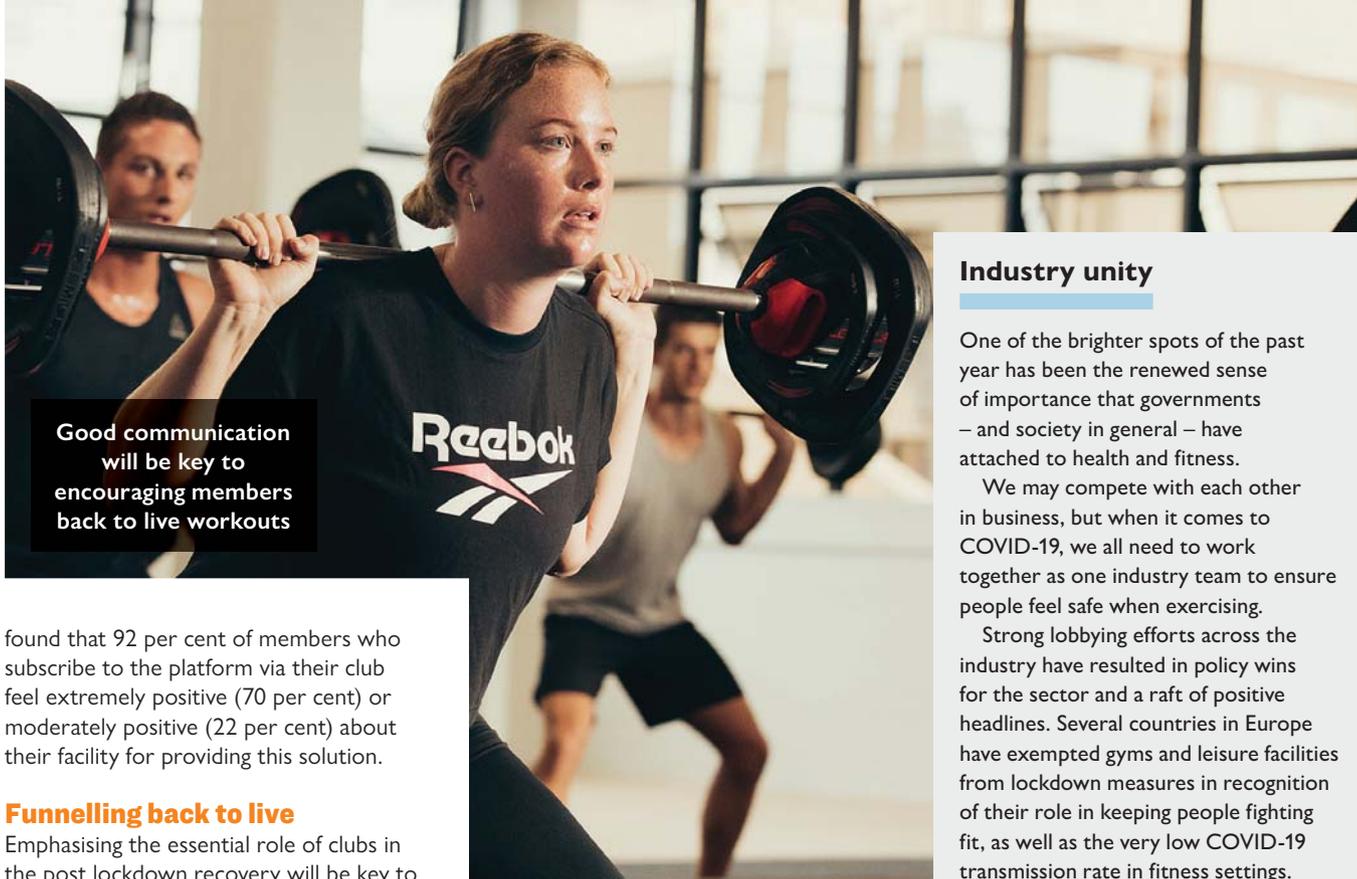
The emergence of high-powered digital fitness offerings from the likes of Apple and Google certainly won't make life any easier for operators, but with every challenge to the club model comes fresh opportunity. Clubs may not have the financial might or brand power of major tech firms, but they have assets that Big Tech can't yet match: highly-engaged communities centered around authentic, human connection.

On the digital side, the crucial part for clubs is serving up high-quality on-demand fitness content and livestream classes that are motivating, fun, and results-driven. YouTube is chock-full of free, average fitness content, so club offerings need to be world-class to keep the audience coming back and paying.

Clubs which can provide high-class digital solutions to members will also reap rewards in terms of retention. The November 2020 LMOD survey

High quality digital offerings will reap rewards long-term

PHOTO: DAN ROOT PHOTOGRAPHY



Good communication will be key to encouraging members back to live workouts

found that 92 per cent of members who subscribe to the platform via their club feel extremely positive (70 per cent) or moderately positive (22 per cent) about their facility for providing this solution.

Funnelling back to live

Emphasising the essential role of clubs in the post lockdown recovery will be key to bringing members back, while harnessing digital solutions to engage members and boomerang them back to live workouts is the blueprint for recovery.

Every club has a hardcore following, but not everyone will be back right away, so it's important to be proactive across communication channels, emphasising how good it feels for people to be back in the gym.

In markets that were quick to recover, such as China, operators such as Pure Fitness set out rebound plans designed to reactivate members, bring back those who cancelled and attract new faces. Campaigns incentivised members to bring their spouse or family members to the gym, while early bird discounts for people to join within the first four to six weeks have also been common.

Obviously, appropriate offers need to vary by local market conditions and capacity.

The strides operators have made to enhance digital offerings will help future-proof our clubs, as did making the provision to deliver live classes outside while the restrictions prohibited indoor group exercise.

While so much has changed, some things remain the same. It's our people who inspired members to join and it's our people who will be key to bringing them back. As well as the operational impact your team can make, consider the emotional contribution they can make in helping members feel safe again.

"Instructors hold the hearts of members more than anyone else in the club and this is needed now more than ever,"

Industry unity

One of the brighter spots of the past year has been the renewed sense of importance that governments – and society in general – have attached to health and fitness.

We may compete with each other in business, but when it comes to COVID-19, we all need to work together as one industry team to ensure people feel safe when exercising.

Strong lobbying efforts across the industry have resulted in policy wins for the sector and a raft of positive headlines. Several countries in Europe have exempted gyms and leisure facilities from lockdown measures in recognition of their role in keeping people fighting fit, as well as the very low COVID-19 transmission rate in fitness settings.

Data from ukactive showed that for every 100,000 visits to UK gyms and leisure centres during 2020, only 1.7 people tested positive for COVID-19, while there is no evidence transmission took place in gyms, or that people had the virus while they were in the gym.

says Carrie Kepple, chair of IHRSA and MD of Styles Studios Fitness in Illinois.

"These instructors are often the types who will jump right back in and do whatever it takes to get members feeling good again. They're likely to have lots of existing relationships with members and it's also important to ensure they make a real effort to connect and engage with members they don't know." ●



RESEARCH

HCM

HANDBOOK

2021-2022

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THE LAST YEAR IN STATS

A study by Savanta
ComRes found

51%

of respondents rank exercise
in the top three ways of
how to help the NHS

58%

said they managed their
physical and mental health
during lockdown by being active

According to Sport England, only
18% of women who follow fitness
influencers find their highly polished
and curated personalities relatable

According to ukactive, the physical activity sector lost
around **£400m a month** during the lockdowns, and it costs
the NHS **£7.25m a week** in lost social value, based on the
loss of health interventions usually provided by the sector

A Mindbody survey found **60%** of Americans say
the pandemic has brought home the message they
need to be more healthy to withstand disease

Virtuagym customer
survey found **51%** of
gyms used fitness
trackers to assist
clients meet their
goals during lockdown
and fitness app usage
increased by

340%

For every **100,000**
visits to UK gyms and leisure
centres in 2020 **only 1.7**
people went on to test
positive for COVID (ukactive)

52% of people
surveyed by YouGov felt
lockdown restrictions had a
negative impact on mental
health. Of these, **59%** were
women; **66%** were aged **25**
to **34** and **57%** had children

A survey by sports retailer,
Decathlon, found London to
be the gym capital of the UK,
with **43%** saying the gym is
their preferred fitness activity

Public Health England found

70%

of adults want to get healthier in 2021 due to the threats posed by Covid

80%

of people over 18 have made the decision to change their lifestyle

Sport England's Active Lives Children and Young People Survey showed that

44.9%

of children and young people in England met the recommended levels of exercise (60 minutes or more a day) during 2020

Global Wellness Institute: mental wellbeing is a **US\$121bn** (€101.6bn, £91.8bn) segment of the global wellness economy

Leisure-net found that 69% of gym goers who returned between July and November 2020 were confident in the facility's COVID related systems and 35% were more confident at the gym than other public places. 12% said they weren't confident at all

According to Activity Alliance, **81%** of disabled people want to be more physically active but are unable to as the demand for their need is not being met by operators. Sport England figures showed that disabled people are twice as likely to be inactive as non-disabled

UCL research showed 40% of the UK population exercised less in lockdown 3 than the first lockdown and were spending more time doing sedentary activities

Digital Health Generation:

70%

of young people – some as young as 8 – are using apps, YouTube videos and digital online technologies to track and manage aspects of their health

University of Pittsburgh School of Medicine found that **95%** of those who follow a weight loss programme with a friend are successful compared to **76%** who go it alone

University of Glasgow: from 2003 to 2017 deaths attributable to excess body fat and obesity have increased from 17.9% to 23.1%

IT'S A LOCK IN

Lockdown led to us eating less fruit and veg, taking less exercise and boozing more. The UEA's Dr Felix Naughton talks to Kath Hudson about his research into lifestyle habits under lockdown...

“Although there were winners and losers, our research indicated the lockdowns has a negative impact on lifestyle behaviours. The main problem will be if some of these negative changes turn into enduring habits once normality resumes,” says Dr Felix Naughton, lead researcher on the University of East Anglia’s C-19 health behaviour and well-being daily tracker study. “Just a small negative change in lifestyle behaviour would result in a later jump in prevalence of chronic disease and death when converted to a national scale.”

The study kicked off in April 2020, just after the first lockdown was announced. A cohort of more than 1000 UK-based residents were assessed for 84 days, via a daily survey asking about symptoms, mood, wellbeing, nutrition, physical activity,



Dr Felix Naughton

sleep and substance use.

This was backed up with qualitative interviews with a sample of the group. Follow up surveys were conducted at three and six months and 12 months.

As the UK population struggled to adapt to life under lockdown, working at home, being furloughed, or coping

with the stress of being a key worker, as well as dealing with the ever present anxiety of the virus, and sometimes home schooling, the survey suggested unhealthy habits and negative coping strategies were more prevalent than a detox and a jog. Worsening unhealthy behaviours were most associated with being younger, female and having a higher BMI.

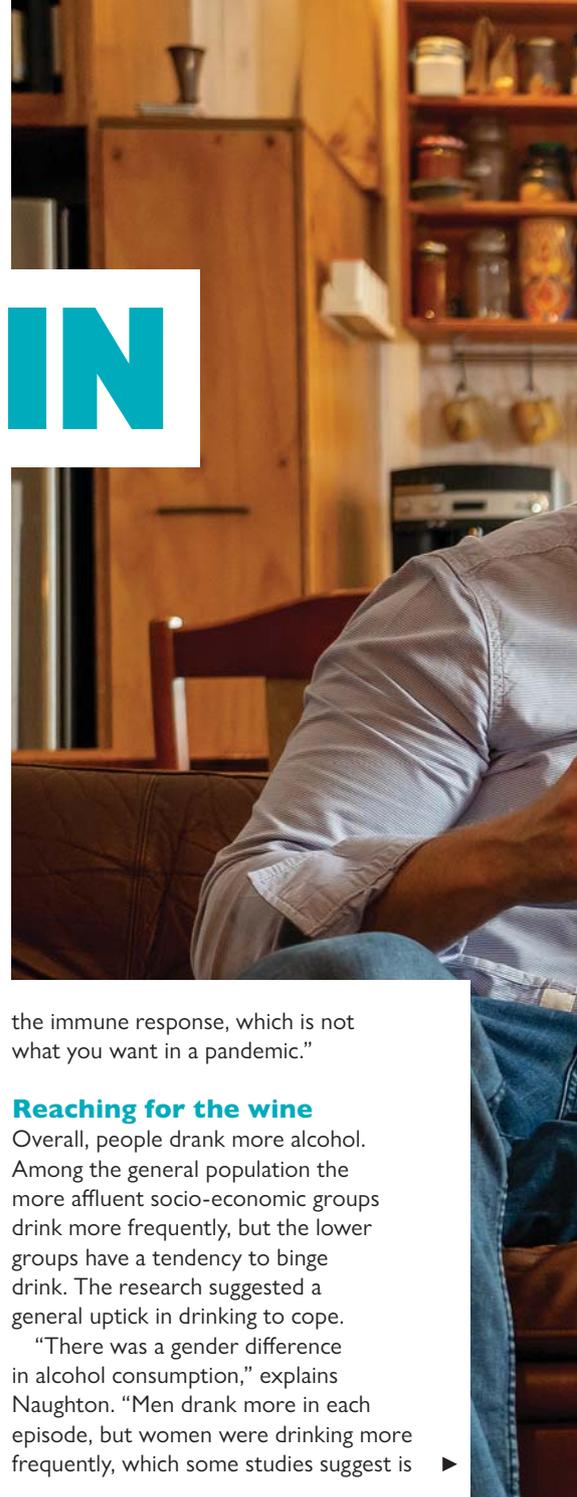
“On average, people’s health behaviour worsened in the early stages of the pandemic,” says Naughton. “And even short term unhealthy habits can impact

the immune response, which is not what you want in a pandemic.”

Reaching for the wine

Overall, people drank more alcohol. Among the general population the more affluent socio-economic groups drink more frequently, but the lower groups have a tendency to binge drink. The research suggested a general uptick in drinking to cope.

“There was a gender difference in alcohol consumption,” explains Naughton. “Men drank more in each episode, but women were drinking more frequently, which some studies suggest is ▶





Men drank more in each episode, but women were drinking more frequently, which some studies suggest is connected to pandemic related stress



Although lockdown led to more alcohol consumption, it wasn't during the day

SHUTTERSTOCKSAM WORDLEY

- connected to pandemic related stress. “Being a key worker, older and male was associated with a greater number of drinks consumed on a typical day’s drinking and consuming alcohol on a greater number of days was associated with being older and female.”

Longer term, Naughton thinks this could lead to people drinking more: “We take our behavioural cues from our environment,” he says. “So if people didn’t used to drink at home but have now become accustomed to it, they might carry on doing so.”

Skipping the daily exercise

The survey also revealed an average 20 per cent reduction in the days where participants did more than 30 minutes of moderate to vigorous physical activity. “This is quite a big drop,” says Naughton. “Younger people showed the biggest reduction in physical exercise, possibly because they think less long term than older people about how exercise can impact their health.

“Another group which revealed an increase in unhealthy behaviours was people who are overweight or obese. We can only speculate that much of their routine physical activity came from moving about in their every day lives and they had fewer habits to purposefully exercise.”

With people being housebound, the physical activity they would usually get as part of their daily routine was stripped away: for example walking or cycling as part of their commute or walking around their workplace. Under lockdown, people had to make a concerted effort to exercise and if they are not in the habit of doing so, or don’t live in an environment which is conducive to exercise, then they were more likely to become inactive.

The study showed people who had health conditions which made

them more at risk of developing a bad response to COVID displayed some of the biggest reductions in physical activity. Naughton attributes this to shielding, making so many housebound.

“There are many factors which influence how physically active people are,” he says. “But shielding did prove to be life limiting. One person suddenly showed a marked change in behaviour and their activity levels greatly increased. When we questioned them it was because they had become fed up with shielding and decided to go back to their allotment.”

Cutting down on vegetables

Relative to pre-pandemic levels, participants ate almost one portion of fruit and vegetables less per day. Although that might not sound drastic, Naughton points out that if this was scaled up across the nation it would equate to a 5 per cent increase in premature death from cardiovascular disease.

The research showed that people with a high BMI also had a worse diet and were more likely to snack than those with a low BMI.

“This may reflect that people with a higher BMI are more likely to comfort



The research suggested lockdown led a few of us to comfort eat

SHUTTERSTOCK/AHMET MISIRLIOGLU



We saw a 15 per cent increase in strength training, which was positive and suggests people might be finding different ways to engage with physical activity in the home

A sizeable uptick in strength training was one of the more positive findings

eat and have a tendency to use high sugar snacks as a coping strategy,” says Naughton.

Stepping up strength training

Amongst the gloomy results, there were also some glimpses of positive behaviour change, including a sizeable increase in strength training. “We saw a 15 per cent increase in strength training, which was positive and suggests people might be finding different

ways to engage with physical activity in the home,” says Naughton.

“Also we expected to see an increase in high sugar snacks, but there was no overall change in that respect. Some people increased and some decreased, so on average there was no change.”

Despite the well documented stress of home schooling, fortunately there was no indication that it drove people to day drink: “We looked at whether having

parental responsibility during working hours changed health behaviours during lockdown, but there was no effect.”

The team are now working on analysing the results of the follow-up surveys, but so far it would appear the initial changes have largely persisted, especially because of the prolonged third lockdown in the winter months, when morale dipped. “People were fed up with having their lives on hold, working from home or not working at all and were finding it hard to motivate themselves,” says Naughton.

As we edge towards normality again, hopefully for good, there is the hope that people will find they are able to improve their health. “This would have an important bearing on our national ascent out of the pandemic,” says Naughton. “Healthy behaviours lead to a better immune response, which improves the ability to fight COVID, makes the vaccine more effective as well as contributing to good mental health.” ●

CABIN FEVER

We learned a great deal about the psychology of people and their commitment to exercise during pandemic lockdowns, as research from UCL has found. Kath Hudson reviews the findings

People were working more hours during lockdown 3.0 which impacted on activity levels

Whereas in the first lockdown it seemed like everyone was dragging bikes out of sheds, going for walks in the best spring weather in years, embarking on gardening and DIY projects, and embracing activities like crafting, baking or making TikTok videos, this enthusiasm to make the best of things appeared to have fizzled out by 2021, according to UCL research.

From the start of the first lockdown, UCL assessed the psychological and social impact of the pandemic, via weekly surveys and selected interviews of more than 70,000 adults in the UK for the UCL COVID-19 Social Study.

Funded by the Nuffield Foundation, with additional support from Wellcome and UK Research and Innovation, UCL updated a number of organisations, including the World Health Organization and the UK government Cabinet Office.

Heading to couchlandria

In January, the UCL research showed 40 per cent of the UK population was exercising less in the third lockdown than during the first, with 97 per cent watching more television, streaming films or gaming.

Hobbies also waned in their appeal, with 36 per cent reporting reduced involvement with arts and crafts and 30 per cent saying they were less engaged with other hobbies, such as gardening and DIY.

Lead author, Dr Daisy Fancourt said: "It's not surprising the third lockdown saw fewer people exercising than the first, taking place as it did during the winter months, but this is still a cause for concern, as exercise can boost not just physical, but also mental wellbeing.

"The reduction in time spent on hobbies and volunteering can partially be explained by the increased time spent working, but

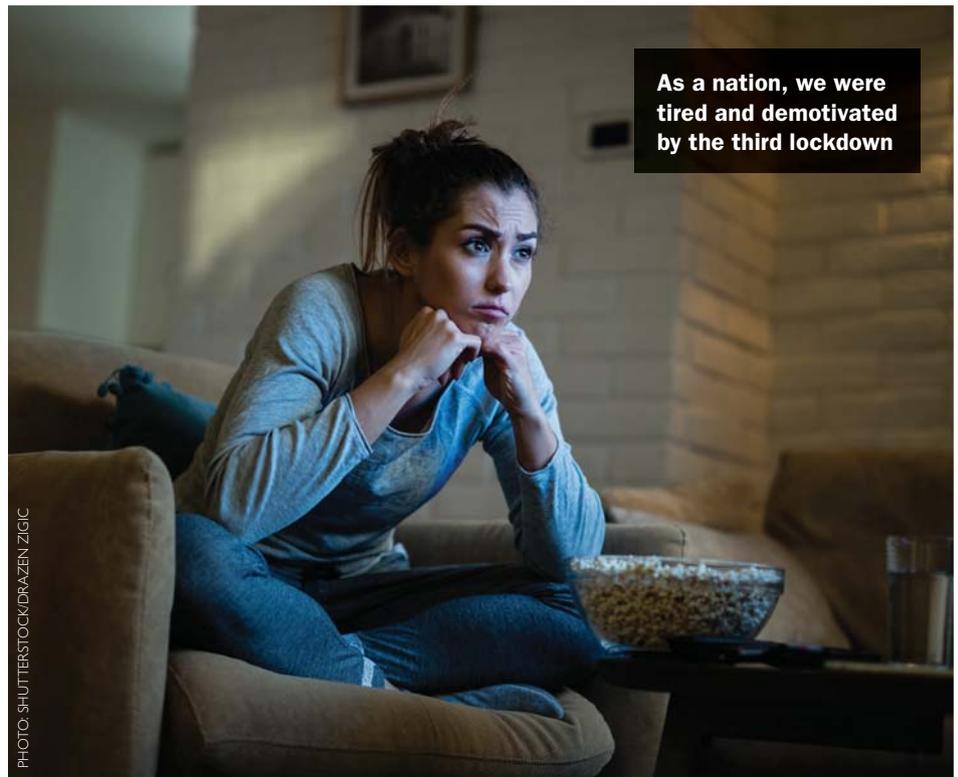


PHOTO: SHUTTERSTOCK/DRAZEN ZIGIC

As a nation, we were tired and demotivated by the third lockdown

In January, the UCL research showed 40 per cent of the UK population was exercising less in the third lockdown than during the first one and 97 per cent were watching more television, streaming films or gaming.

also hints the novelty of increased free time which came with the first lockdown wore thin among much of the population, with many turning towards the easier options of television and gaming to fill their time."

Survival mode

Laura Brooks, development manager at mental health charity Sport in Mind, says

the short days and the winter weather had an impact on the levels of exercise, but she also believes time was a factor, with increased pressure around home schooling and a stronger work focus. According to the research 34 per cent of people reported they were working more.

"In the third lockdown, more pressure was put on people to perform normally ▶

In lockdown three we all entered survival mode. When you have an end date you can pace yourself, but when you don't know how long something is going to go on for it has a negative impact on motivation levels

- ▶ with work, at the same time as juggle home schooling, which was more intense than in lockdown one,” says Brooks. “In lockdown three we all entered survival mode.

“When you have an end date you can pace yourself, but when you don't know how long something is going to go on for it has a negative impact on motivation levels.”

By the middle of February, when UCL was collating the results from weeks 46 and 47, there was evidence that mental health had taken a real dip across the nation, with happiness levels hitting the lowest point of the entire pandemic and life satisfaction at its lowest since the spring of 2020. Depression and anxiety levels had worsened since the summer, falling after the announcement of the third lockdown. Loneliness was also at the highest level.

Those most affected by symptoms of depression and anxiety were young adults aged 18 to 29, women, people with lower household income, people with a long-term physical health condition, people from ethnic minority backgrounds and people living with children.

“This is another sign that many people found the third lockdown much tougher than the first and were more focused on just coping with their current circumstances, rather than attempting to find ways to enjoy them,” says Fancourt.

PHOTO: SHUTTERSTOCK/KIZENON

Cycling was one of the winners of the lockdown, with bikes as scarce as toilet roll

Sport in Mind's Paul Owen says: “The third lockdown did start to feel like an extension of the first one. In December, as vaccinations became approved, we felt a sense of hope that the end was in sight. But, even though the vaccination rollout, was going well through January and February, and having a major impact, the progress was set against the darkest days of the pandemic in terms of the rising death toll, hospital admissions, a soaring infection rate and news of the variants.”

Owen predicted that as the easing of the third lockdown coincided with lengthening days, improving weather, lower infections and a successful vaccination programme, spirits were likely to lift, as they had in June 2020 after the first lockdown.

Double whammy

However, as the virus will leave its legacy in terms of economic disruption for some time to come, it will continue to have an impact on mental health. In December 2020, UCL discovered that one in three people were worried about finances and one in six were worried about their jobs. For many, Brexit is causing a double whammy, with 10 per cent saying its impact gives them sleepless nights.

Brooks predicted there would be a pent up demand for getting back to exercise routines and also engage in organised exercise in venues, but even with the vaccine boosting confidence it would still take some people a while to acclimatise to being back indoors with other people.



Across the board it's been a challenging time, with some people who had existing mental health issues finding they got worse and people who had never suffered with their mental health, experiencing symptoms of depression and anxiety for the first time.

However, Owen does point out one point of focus: "One thing which might come out of the pandemic is that with more people suffering from depression and anxiety, it becomes easier to have the conversation about mental health. Lots of taboos have been blown away which could set a better climate for the future."

From both a physical and a mental health viewpoint, the health and fitness industry has never been needed as badly as it will be in the months and years ahead. ●

Even in April 2020, one in four were doing no exercise and 80 per cent of 18- to 30-year-olds reported not doing any moderate or high intensity activity. So who was doing what?

30 minutes or more of high intensity activity in the last day

- 14% of 18- to 30-year-olds
- 10% of those 31 to 45
- 9% of 46- to 59-year-olds
- 6% of those 60 plus.
- 12% of men
- 8% of women
- 6% of people living along
- 10% those living with others
- 5% of those with annual household incomes of less than £30,000 versus 12% for those with higher incomes.
- 6% for those with physical health conditions
- 12% of those without a physical health condition
- 5% with mental health conditions
- 10% without
- 5% of those with annual household incomes of less than £30,000
- 12% for those with annual household incomes of more than £30,000

Those doing gentle exercise out of the house

- 36% reported going for a walk or other gentle physical activity for at least 30 minutes
- 39% hadn't done any
- 43% of over 60s
- 32-35% in other age groups
- 40% of those with annual household incomes of more than £30,000
- 33% of those with a physical health condition
- 28% of those with a mental health condition

Exercise at home for 30 minutes or more in the past day

- 18% overall
- 24% of 18- to 30-year-olds
- 19% of 31- to 45-year-olds
- 16% of those over 46
- 19% women
- 14% men
- 16% living alone
- 19% living with others
- 20% income above £30k
- 15% income lower than £30k

No exercise at all

- 26% of those aged 46-59 years
- 28% those living alone
- 29% those with lower household income
- 29% those with a long term physical health condition
- 34% diagnosed mental health conditions

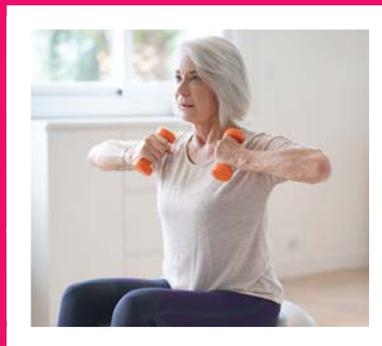


PHOTO: SHUTTERSTOCK/GOODLUZ

The over 60s preferred gentle exercise to high intensity

COVID DEFENCE

Researchers are calling for public health campaigns to highlight the importance of physical activity after new studies show a link between inactivity and a higher risk of COVID-19 complications

A study by an international team of researchers, led by Glasgow Caledonian University (GCU), has found physical activity can reduce the chance of catching COVID-19 by 31 per cent, while boosting the effectiveness of vaccines by up to 40 per cent.

Added to this, the team found physical activity could cut the risk of dying from infectious diseases by 37 per cent.

Led by GCU's professor of health behaviour dynamics, Sebastien Chastin, the study is believed to be the first in the world to look into the link between exercise and COVID-19 immunity. It is based on a systematic review of 16,698 worldwide epidemiological studies published between January 1980 and April 2020.

First line of defence

The research found that 30-minutes of activity which gets people out of breath – such as walking, running, cycling and strengthening exercises –

five days a week (or 150-minutes per week) can have a massive impact on immunity to infectious diseases.

Professor Chastin said this is the first piece of research which proves regular physical activity gives this protection: “The results show how physical activity strengthens the first line of defence of the human immune system by increasing the concentration of immune cells.”

The team discovered regular exercise, where the individual gets out of breath, boosts immunity to infectious disease by 31 per cent, by boosting the mucosal layer of antibodies which are responsible for identifying foreign agents in the body.

“We also found that if you add physical activity to your vaccination programme it increases the potency and effectiveness of the vaccination,” says Chastin. “A 12-week physical activity programme undertaken before the COVID-19 vaccination is given could result in 20 to 40 per cent more effective immunisation.”



SHUTTERSTOCK/RIDO

Campaigns needed

The research, titled *Effects of regular physical activity on the immune system, vaccination and risk of community acquired infectious disease in the general population: Systematic review and meta-analysis* – was published in the *Sports Medicine* journal.

The findings have been sent to the Scottish Government and other governments, public health experts and ▶



Physical activity strengthens the first line of defence of the human immune system and gives a higher concentration of immune cells



Regular exercise can have a positive impact on resistance to infectious diseases



SHUTTERSTOCK/LIDERINA



SHUTTERSTOCK/EIUNIR

Being active offers protection to people who contract COVID-19

► healthcare professionals around the world, including Public Health Scotland, Public Health England, the South African and Belgian governments and football’s world governing body, FIFA.

Chastin has called for public health campaigns to be undertaken to inform the public of the importance of being physically active in fighting the pandemic: “The promotion of physical activity and access for all to physical activity pursuit are paramount. Policymakers need to do everything they can to fight this disease. This is not a panacea, but another cheap tool we can use to protect the public.

Risks of inactivity

A US study, published in the *British Journal of Sports Medicine*, has provided further evidence to support the argument that being physically inactive is a major risk factor for people if they contract COVID-19.



“Physical activity can reduce the chance of catching the virus by 31 per cent, while boosting the effectiveness of vaccines by up to 40 per cent”

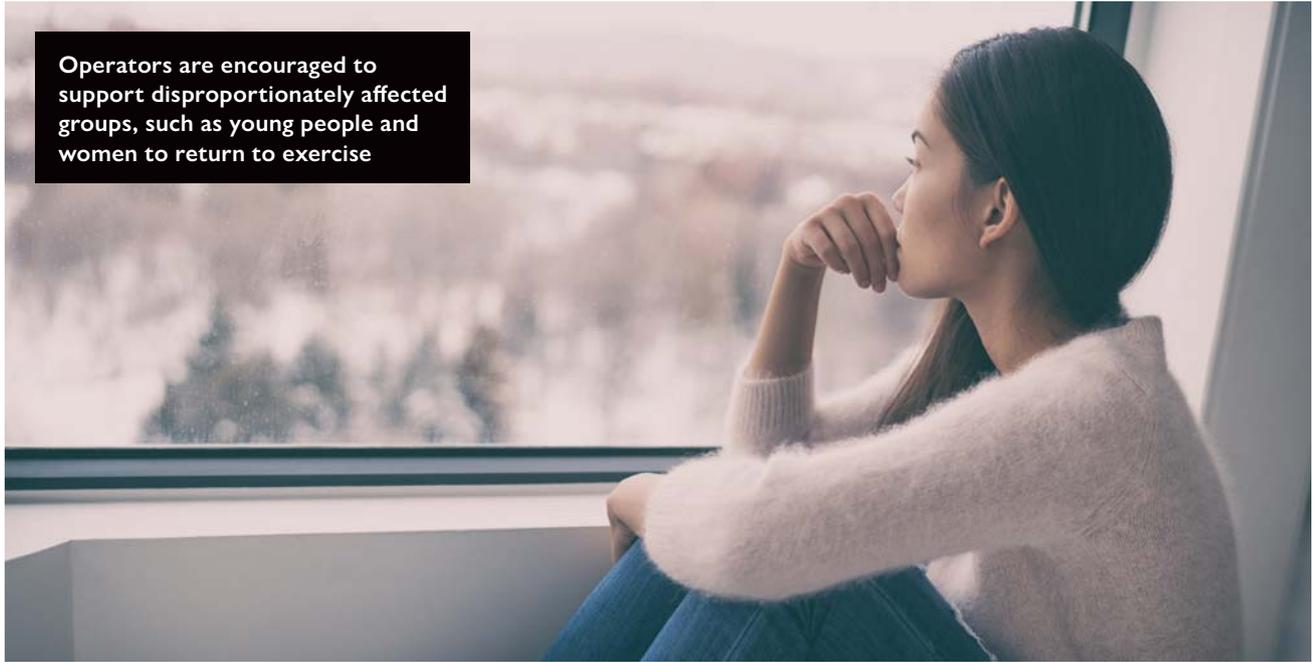
Researchers at the Kaiser Permanente Medical Center in California studied the outcomes of 48,440 adults who had suffered from COVID-19. They found patients who were consistently inactive for two years preceding the pandemic were twice as likely to be admitted to hospital as those who regularly clock up more than 150 minutes of physical activity every week.

Those who are physically inactive were 73 per cent more likely to require intensive care and 2.5 times more likely to die than those who’d consistently met World Health Organization physical activity guidelines.

As a risk factor for severe complications, physical inactivity was only exceeded in severity by advanced age and people having a history of organ transplant.

The study also found that consistently meeting physical activity guidelines was strongly associated with a reduced risk of serious outcomes following COVID-19. ●

Operators are encouraged to support disproportionately affected groups, such as young people and women to return to exercise



SHUTTERSTOCK/MARIDAV

Lockdown impact insights

Support England's latest *Active Lives Adult Survey* showed 27.1 per cent of England's adult population is now classed as physically inactive – undertaking less than 30 minutes' exercise each week.

The biggest hit to activity levels was during the first lockdown, when the proportion of the population classed as physically active fell by 7.1 per cent – representing more than 3m adults.

As restrictions eased, activity levels were still down compared to 2019, but reductions were smaller. There were 4.4 per cent (2m) fewer active adults from mid-May to mid-July and 3.1 per cent (1.4m) fewer from mid-July to mid-September. Restrictions imposed in November saw levels decreased by 1.8 per cent.

However, Tim Hollingsworth, CEO of Sport England says the impact could have been worse: "It's encouraging to see so many still found ways to be active despite the majority of opportunities being unavailable or severely restricted."

Hollingsworth also pointed out the health inequalities which the pandemic has exacerbated and urged the industry to support particular groups to return to activity: young people, disabled people, those with a long-term condition and those from a Black or Asian background. Women were shown to be less likely to return to activity than men.

"The decline in activity levels in the 16 to 24 age group is of major concern," Hollingsworth said. "Helping and inspiring

young people to re-engage with sport and physical activity must now be a number one priority for us all."

CEO of ukactive, Huw Edwards, said it was no surprise activity levels dropped off considering gyms and leisure centres were shut for five months out of 12: "Fitness and leisure centres are essential for our nation's health, which is evidenced by the impact of their closure, particularly on vulnerable groups such as older adults, ethnic minorities, people with long-term conditions and those from lower socio-economic backgrounds."

Edwards predicts the re-opening, especially group exercise classes which are so popular among women, would aid the nation's physical and mental recovery. ●

THE DATA AGE

Moving Communities represents a watershed moment in how the public sector is using data to inform strategic decision making. 4global Consulting's Ed Hubbard reports....

As soon as government restrictions closed the doors of clubs and leisure centres, it became apparent the industry was in need of emergency funding to ensure facilities could re-open safely and effectively as soon as they were allowed.

To enable this, Sport England secured £100m, provided by the Exchequer via the National Leisure Recovery Fund (NLRF), working with local government and allowing local authorities to support operators when they re-opened.

Through the application process and allocation of funding, it became clear that in order to invest efficiently and report on the effectiveness of this recovery funding, a greater focus and understanding of data was required across the public sector.

So Moving Communities was born, a digital transformation programme designed to bring consistent reporting standards



DR STEVE MANN © MARK EARTHY

We must ensure the recovery is needs-led and insight driven, making the most of exciting developments for data collection and analytics capabilities across the sector

Dr Steve Mann,
director at 4global Consulting

across the sector and to provide data and insight on the recovery and performance. Moving Communities has been working with leisure operators and local authorities, to aggregate live data integrations which are automatically standardised and presented in platforms and graphical reports. For the first time, we have a comprehensive view of operational and financial performance for the public leisure sector.

“Never before has our sector placed such a focus on collecting data and this will be key to the recovery,” says Dr Steve Mann, director at 4global Consulting. “We must ensure the recovery is needs-led and insight driven, making the most of exciting developments for data collection and analytics capabilities across the sector.”

Transparent understanding

Moving Communities is enabling stakeholders to understand how, why ▶



Data from Moving Communities showed younger people and males were the first to come back to gyms.

- ▶ and where people are returning to leisure facilities. The dashboards within the platform can be viewed by both local authority clients and operator delivery partners, ensuring a consistent and transparent understanding and approach to data and reporting.

All local authorities and operators involved in Moving Communities can see the performance of facilities on the platform, which also benchmarks local performance against statistical neighbours and national figures. Infographics and insight reports are also being published regularly, presenting the key sector KPI's

and providing greater depth on specific demographic groups.

As reported in HCM 2021 issue 3, Moving Communities is led by Sport England and delivered by a group of partners including Leisure-net Solutions, the Sport Industry Research Group at Sheffield Hallam University, 4global, Max Associates and Quest, with the delivery model building on the repurposed the National Benchmarking Survey (NBS). ukactive also plays an important role, building on previous Moving Communities reports and engaging members to ensure comprehensive data supports the growth

of the whole sector. All local authorities which benefit from the NLRF funding are part of the Moving Communities service, which benchmarks income, expenditure, participation, social value and the customer experience.

Customer experience has been measured through a national online survey, which is the largest experience survey of its kind undertaken in the sector, with more than 1,000 leisure facilities taking part.

According to Leisure-net director, Mike Hill, the aim is to understand more about behavioural changes and the motivations of participants: "We want more than 50,000 completed customer experience surveys, giving us further feedback on potential barriers and challenges associated with the return to facilities."

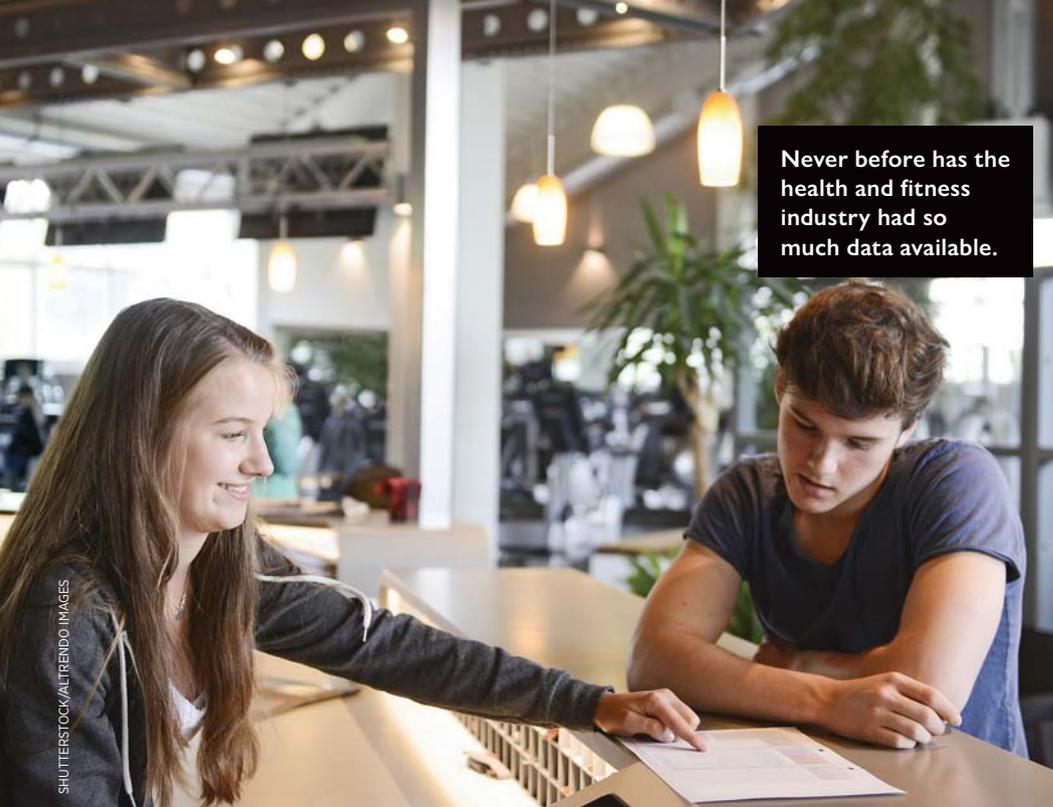
Tracking the recovery

This project represents a step change in the way the sector uses data to demonstrate our impact, or to inform operational planning. The critical need for this was demonstrated during the pandemic, as the industry's ability to lobby was dependent on the robustness of evidence we could provide. A key objective of Moving Communities is to put regular, compelling insight into the hands of decision makers, to drive further investment and support.

Throughout the summer and into autumn, as operators and local authorities strive to get back to 2019 levels of usage,



Facilities involved with Moving Communities can now benchmark their performance



Never before has the health and fitness industry had so much data available.

SHUTTERSTOCK/ALTRENDI IMAGES



LEISURE-NET

We want more than 50,000 completed customer experience surveys, giving us further feedback on potential barriers and challenges associated with the return to facilities

Leisure-net director, Mike Hill

Moving Communities will measure and evidence the sector's recovery from the pandemic. We will see how behavioural and societal changes, such as a greater proportion working from home, affects the longer-term performance of the industry and explore how the pandemic has contributed to health inequalities. This insight will enable time, effort and money to be invested in way which will benefit those communities who need the most help, allowing us to evidence, shape and motivate the nation to get active.

Moving Communities will be a central part of future engagement with the healthcare industry and a tool which enables services to be marketed to new audiences in different ways. What we have seen so far is the tip of the iceberg, with huge potential just under the surface if we continue to develop as a sector. ●

Initial results are now in

Insight from the first six weeks of Moving Communities' reporting demonstrated the early trends of the demographic profiles of early returners. A greater proportion of male participants have returned, compared to 2019, which is likely to have been driven by restrictions on group exercise. Younger age groups have also shown a higher return rate than older adults.

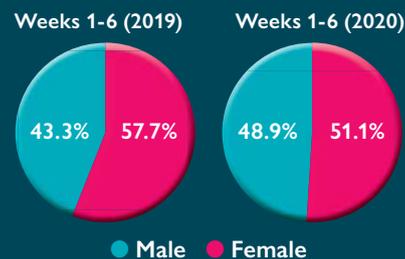
Early data indicates a greater proportion of participation in leisure centres has come from people in more deprived areas, compared to the same time period in 2019. While there is still higher total participation by those from less deprived areas, the distribution across the Index of Multiple Deprivation deciles is more balanced than before the pandemic.

Deprivation breakdown for visits

IMD	2019	2021	Change
1	5.8%	6.6%	0.8% ▲
2	9.0%	9.5%	0.6% ▲
3	8.6%	10.4%	1.8% ▲
4	8.7%	9.7%	1.0% ▲
5	9.6%	10.2%	0.6% ▲
6	10.0%	10.1%	0.1% ▲
7	10.3%	9.8%	-0.5% ▼
8	10.4%	10.2%	-0.2% ▼
9	11.8%	10.7%	-1.2% ▼
10	15.8%	12.9%	-2.9% ▼
Total	100.0%	100.0%	

Source: Moving Communities

Gender breakdown for visits



State of EUROPE

The European Health & Fitness Market Report, published this month, gives deep insights into the impact of the pandemic on the sector. Liz Terry highlights some of the key findings



Deloitte's annual report into the European Health and Fitness market in partnership with EuropeActive – now in its eighth edition – has assumed extraordinary significance this year, given it details the impact of the pandemic on health and

fitness businesses across the continent, laying bare for the first time the full extent of the destruction wrought by COVID-19 on the sector.

In introducing the report, the authors say this is the first year since records began where the market was not measured as having increased in size.

As such, the report becomes a benchmark from which the industry can rebuild and track a new course, as we consider the wider opportunities for growth as revealed by the disruption.

RSG Group held onto 91 per cent of its members during pandemic mandated closures

Strong direction in this regard is given in the Foreword by Andreas Paulsen, CEO of EuropeActive, who says: "EuropeActive's recovery strategy will focus on helping our businesses recover and come back stronger after the pandemic in order for our sector to regain and expand our positive impact on the health and wellbeing, as well as the economy, of Europe."

What's inside

The 128 page report includes all the major market numbers, country comparisons and also individual country reports, giving insights into macro economic factors, such as population size, disposal income, fitness club memberships and, usefully, average health club membership fees as a percentage of disposable income.





PHOTO: THE GYM GROUP

The Gym Group saw a 50 per cent fall in revenue during 2020 due to the UK's extensive lockdowns

Deloitte has also tracked the current situation with VAT around Europe, showing how differing government approaches have either supported or burdened the sector. In Romania for example, VAT on gym memberships is set at 5 per cent, while in neighbouring Hungary, it's 27 per cent – the highest in Europe.

Norway wins the VAT race overall, with VAT set at zero on health club memberships.

A number of other governments have chosen to give the health and fitness sector VAT breaks, including Ireland, Poland, the Netherlands, Belgium, and the rest of Scandinavia.

The European Health & Fitness Market Report also has a whole section detailing the major European operators and their

status in 2020 in terms of borrowings, turnover and development plans.

Primary findings

Clubs, studios and gyms across the continent had a total of 54.8 million members in December 2020 – a significant fall from the 64.8 million members recorded in 2019.

This loss of roughly 10 million members represents an average drop of 15.4 per cent across Europe – although losses hit UK operators harder than those in many other countries, with The Gym Group, PureGym and Nuffield reporting falls of 27 per cent, 27.8 per cent and 26 per cent respectively, versus European operators such as Basic-Fit (10 per cent fall), RSG (9 per cent) and SATS (9 per cent).



We have identified our sector's foremost goal as becoming a publicly recognised solution for health and wellbeing in Europe, enabling us to grow our market and expand our impact

- ▶ This is mainly explained by the lengths of government mandated lockdowns experienced Europe, with Deloitte research showing the UK suffered the greatest number of lockdown days in Europe, while at the other end of the scale, Sweden did not experience any closures.

The report also shows that revenues fell by nearly a third (32.9 per cent) across Europe, from the highest ever recorded level of €28.2bn in 2019 to €18.9bn in 2020.

Again, the UK was hit hardest, with Nuffield, Virgin and The Gym Group reporting falls of 46.5 per cent, 47.7 per cent and 50 per cent respectively, versus Basic-Fit (26.8 per cent), RSG (23 per cent) and SATS (18.5 per cent).

Deloitte found that the top 15 European fitness operators by themselves, achieved



The report shows that health club revenues fell by nearly a third across Europe in 2020, from record levels of E28.2bn in 2019 to E18.9bn, with the top 15 operators alone achieving €2.6bn

total revenues of €2.6 billion in 2020.

The total number of fitness clubs declined by only 1.4 per cent in 2020 to 62,775 – a relatively small loss, considering pandemic lockdowns forced clubs to close for an average of between 40 to 50 per cent of their operational days during the year.

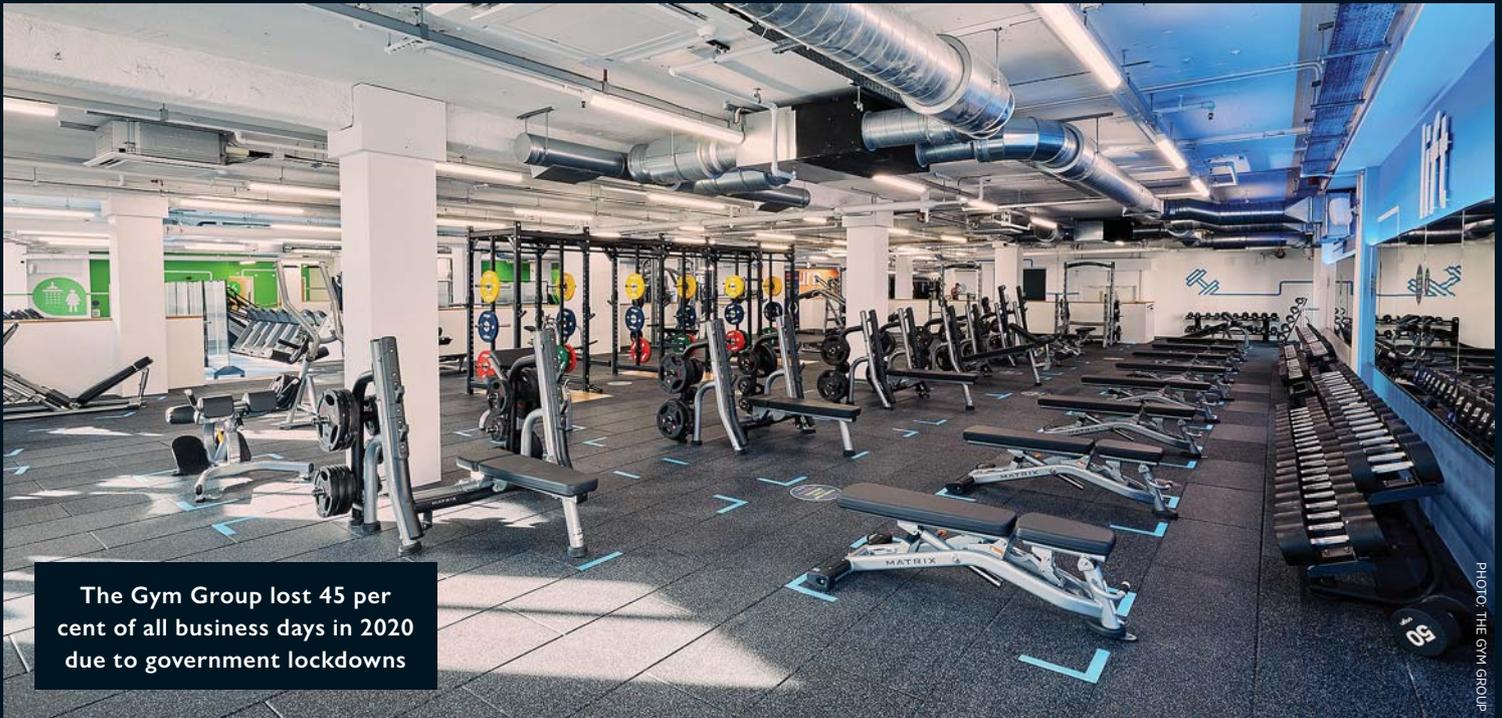
This robust result is attributed both to the high levels of government support received by the sector and also operators' ability to raise funds to support their balance sheets.

Among the other key findings in the European Health & Fitness Market Report is that the confidence of investors in future growth opportunities within the fitness sector remains high. "This is demonstrated by the large sums that were invested in the various segments of the fitness ecosystem

Basic-Fit retained 90 per cent of its members during 2020 and raised €337m in funds



PHOTO: BASIC-FIT



The Gym Group lost 45 per cent of all business days in 2020 due to government lockdowns

PHOTO: THE GYM GROUP

during 2020 and early in 2021, both in existing companies and start-ups, both online and offline,” say co-authors, Karsten Hollasch and Herman Rutgers.

Mergers and acquisitions

In spite of the pandemic, and in some cases because of it, 2020 was a busy year for mergers and acquisitions across the European health and fitness market, with 16 M&A deals reported.

Some were standard business transactions, while others – such as JD Gyms’ purchase of Xercise4Less (see our interview with Alun Peacock in HCM issue 6) were the result of them entering administration. The market has also seen six M&D deals already in 2021.

In total, deals saw 835 clubs changing hands in 2020, with 19 Fitness World clubs in Poland being sold twice – once

to Pure Gym in January and then out of administration to insurance company, Medcover, in December.

RSG’s acquisition of Gold’s Gym – a major coup for the European operator and one which has given RSG global reach – was not counted, as at the time all Gold’s Gyms locations were outside Europe, although RSG has wasted no time in bringing the Gold’s brand to Europe, with a major new flagship having opened on 4 June in the German capital. Watch out for our interview with RSG CEO, Rainer Schaller, in the HCM issue 7.

The opportunity going forward

Andreas Paulsen’s comments serve to set direction for the sector when he says: “The COVID-19 health crisis represents a transformative opportunity for our industry. This has led EuropeActive to

identify our sector’s foremost goal as becoming a publicly recognised solution for health and wellbeing.

“When considering our recovery post-lockdown, it’s clear our market opportunities as providers of essential health and wellbeing services are vast... our post-pandemic renewal as a sector should, therefore, focus on how we, individually and collectively, ensure this great transformation.

“Scientific research and evidence are on our side and the rest is very much in our own hands.”

● The *European Health & Fitness Market Report* is compiled by Karsten Hollasch and team at Deloitte Deutschland, with co-editor, Herman Rutgers and published by industry body EuropeActive. Buy the report: www.HCMmag.com/EHFMR20

INDIE KIDS

Independent gyms in the UK have fared better during the pandemic than larger corporate operators in holding on to their members, according to research

Agile and with strong communities, independent operators have shown resilience during COVID-19

One of the ways independents engaged members was to lend out kit for free from the gym during lockdowns

Thanks to being small and agile and able to adapt and pivot quickly to deliver what their members needed during lockdown, independents have outperformed the sector during the past year, according to research by 4global, ukactive and GGFit, called the *Independent Fitness Clubs Benchmarking Report*.

The study found that net member movement was generally positive during key times in 2020 for independent clubs, in spite of being negative for the wider sector. Membership levels bounced back significantly better in terms of visit throughput and active member percentage.

The report is based on a study from July to December 2020, using data from 627 independent clubs, representing a total of 289,000 members, 3.9 million visits to independent gyms and revenue of £32m.

The percentage of active members was lower in July and November 2020, when compared to 2019 levels, due to clubs being in lockdown for most of the time during these months. But by December 2020 the level of active members recovered to within



**Membership levels
bounced back
significantly better
at independent
clubs, both in
terms of visit
throughput and
active member
percentage**



SHUTTERSTOCK/DAVID PEREIRAS

1 per cent of 2019 numbers, showing a healthy appetite for returning to the gym.

Interestingly, independent clubs achieved much higher joiner rates than the rest of the industry during these six months – sometimes by a factor of three. The report suggests this was due to a combination of re-engagement campaigns, re-joiners, and the 'local' business effect of independents reaching out to their communities during the pandemic and gaining more engagement.

Utku Toprakseven, partner at 4global, said: "This report represents the first collaborative dive into the independent gyms collective data and is an exciting opportunity to assess the value of the rich

diversity delivered to members across this sector of the health and fitness industry.

"We very much look forward to working with even more independent operators and system providers in the coming months, with the aim of deepening our collective understanding of the critical impact that independent gyms have to the wider health and physical activity agenda."

"We know independent fitness businesses have been hit hard by the pandemic, but with the support of their

members they've proven to be agile and adaptable to change, which is clearly demonstrated in this report," said Huw Edwards, CEO of ukactive.

"It is our hope that we can continue to support the growth of independents across the physical activity sector by sharing our insight and data, and working together with our members to drive change."

Read the report: www.HCMHandbook.com/independentrecovery
See next page for case studies ▶

► How did independents support their communities?

Nick Whitcombe

Industry campaigner and owner of Body Tech Fitness in Liverpool

Despite multiple competitors opening nearby, our members have been loyal for many years and the strength of our community is truly beautiful. So when the first lockdown was announced, we chose to support them through the physical and mental challenge of isolation by lending out equipment at no charge and no deposit: this included all of our dumbbells, plates, Olympic bars, fixed



bars, accessories, squat racks, bikes, rowers and ergs. This totalled more than £70,000 worth of equipment and every item was returned cleaned and undamaged.

We started a WhatsApp group for those who wanted to stay connected. More than 60 per cent of our members continued to pay through every lockdown, with some even asking to take out a second membership to support us.

When the industry was forced to close in the initial Tier 3 legislation in October 2020, we refused to close our doors until the evidence for this decision was provided. During this period a member set up a crowdfunder which reached £52,00 in five days. Having won the battle – when the government gave in to campaigning to reverse its decision – we donated the monies to mental health charities.

Lockdown seems to have strengthened our member community, with most now having a new level of appreciation for something which they once took for granted. Currently at capacity, we are now holding a waiting list. We are truly grateful, for our community.



PHOTO: NICK WHITCOMBE

Nick Whitcombe gained global media coverage for campaigning to keep gyms open during restrictions

Andy Dick

Owner of Zone Fitness, Weymouth

During the initial lockdown we requested members freeze their membership for £5.00 per month to help support the club to re-open in the same position, with the same staff, classes and quality. The majority did this, but a good number also continued paying the full amount throughout.

Of our 1,800 members, 1,013 paid £5.00; 27 cancelled in April 2020 and the rest paid full fees. The freeze continued until the end of August and those who'd supported us were given full access to the gym in August to thank them for their support.

As we knew Lockdown 2 would be short and payment had already been taken, we offered compensation vouchers to use the gym for free. We used the same process in the third lockdown.

To keep members engaged when closed, we offered discounts for Les Mills On Demand classes, created a Facebook community group so members and staff could interact, created a Strava zone fitness running group and sent monthly emails.

We lost fewer members than other local gyms and since reopening we're seeing our members return at a high rate and extremely happy to be back, with a good uptake of new 12-month memberships. ●





LEISURE-NET

SOLUTIONS LTD

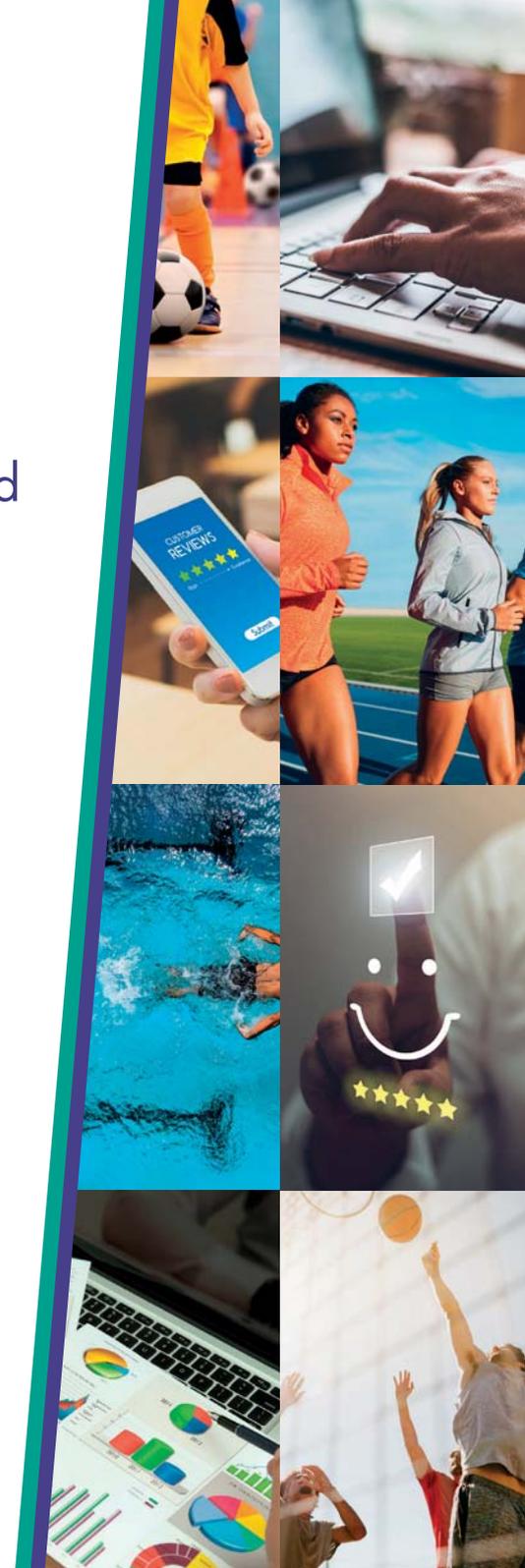
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Feeling the heat

Post exercise passive heating has been identified as an effective way of building endurance, according to research by The American College of Exercise. Senior project manager at ACE, Daniel Green, talks us through the findings

Building endurance typically involves a combination of increased volume of training and steady state exercise and interval workouts, but this can lead to overtraining and injury. However, preliminary evidence has found exercise in conjunction with passive heat afterwards – such as hot water immersion – leads to endurance-related benefits, including increased plasma volume and greater red blood cell mass.

ACE enlisted the help of Lance Dalleck and his team of researchers in the High Altitude Exercise Physiology Programme at Western Colorado University to examine post exercise passive heating strategies. The team examined the impact of wearing a sauna suit and hot water immersion on VO₂max, lactate threshold and exercise economy.

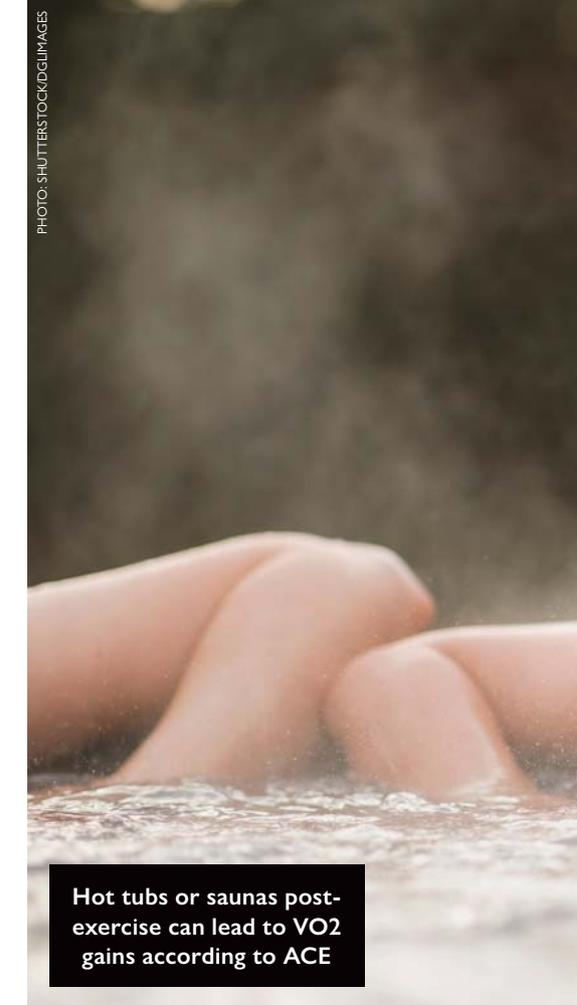
The study involved 24 men and women, aged between 18 to 50, who

were randomised into three groups. The control group performed exercise, but did not use either of the post-exercise passive heating strategies. One group used hot water immersion after exercise and the other group wore a sauna suit.

Hot tubs and sauna suits

At the start and end of the study, all participants performed a running test and their VO₂max and lactate threshold was measured. All completed a three week, five day a week training programme, which involved three days of moderate intensity exercise (Monday, Wednesday and Friday), one HIIT session (Tuesday) and one steady state session at VT₂ (Thursday).

The two non-control groups underwent 30 minutes of passive heat recovery after every moderate intensity session: one group sat in a hot tub and the other group wore full-body sauna suits. Both groups



Hot tubs or saunas post-exercise can lead to VO₂ gains according to ACE

ingested core temperature sensors on two occasions during the heating protocols, to ensure they stayed below temperatures which might increase the risk of heat illness.

After three weeks, mean VO₂max changes and lactate threshold changes in the sauna suit and hot water immersion groups were significantly greater than the control group. However, only the hot water immersion group showed significant improvements in running economy between baseline and three weeks.

In the control group, 50 per cent were categorised as VO₂ responders meaning there was a greater than 3.2



This strategy allows people to augment their training without adding volume or intensity. Performance gains can be achieved without increasing the risk of overtraining or injury

per cent change in VO₂max. But in the sauna suit and hot water immersion groups, 100 per cent of participants were VO₂max responders.

Endurance boost

Based on these results, it was concluded that passive heating strategies following moderate-intensity continuous training, while keeping the core body temperature below dangerous levels, may lead to statistically significant VO₂max and lactate threshold changes.

According to Dalleck, the most important element of the findings is the

practicality of the post-exercise passive heating approaches, as the improvements in endurance-related parameters were obtained with minimal additional time and no additional training: “This strategy allows people to augment their training without adding volume or intensity. Performance gains can be achieved without increasing the risk of overtraining or injury.”

Post-exercise passive heating can also be used to preserve training adaptation if a client is travelling and can't get to the gym, tapering a periodised programme or trying to preserve fitness levels during an off-season programme.

However, Dalleck says there are a few points to bear in mind before implementing post-exercise passive heat strategies. Exercise professionals should have a fundamental appreciation of the three critical performance-defining physiological parameters discussed in this research – VO₂max, lactate threshold and economy – as this will provide a foundation on which to design comprehensive training programmes to optimise endurance performance.

Researchers do not know if more is better when it comes to post-exercise passive heating, so individuals should not go beyond the 30 minutes used in this research in an attempt to make further gains. In addition, they should not go above the temperatures used in this research, as reaching higher core body temperatures can be incredibly dangerous. Staying well hydrated during passive heating is also important. ●



WHO'S WHO

HCM

HANDBOOK
2021–2022

WHO'S WHO

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HCM HANDBOOK

WHO'S WHO UK operators

Who are the key players in your market? We take a look at some of the UK's leading health club chains

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 2021

To continue to build on our digital platform and rationalise revenue streams across our estate.

MD: Mark Braithwaite



Professional background

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

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

How might the industry look in 2022?

After lockdown 3.0 we are anticipating a strong bounce back in the leisure industry, pent up demand and the realisation that individuals need to be healthier off the back of Covid-19 should spark a strong recovery.

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

118 sites across the UK and Ireland.

Plans for 2021

Mobilisation of a number of contracts won during lockdown, evolve our digital offering and grow membership numbers back to pre-pandemic levels.

Managing director: Paul Ramsay



Professional background

I started as a fitness instructor with 3d 25 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.

How might the industry look in 2022?

Our research shows members are desperate to get back into clubs and interact with people again. We believe there will be demand for a hybrid model so have developed a solution giving access to group ex and PT from home.

1610

Trinity Sports and Leisure, Chilton Street, Bridgwater, TA6 3JA

Tel +44 3300581610
Email info@1610.org.uk
Web www.1610.org.uk

Company profile

A not for profit trust operating sports and leisure facilities across the South West. The vision is to transform lives and grow the business to be the best it can be, inspiring active living by putting people at the heart of everything it does and creating a balance of heart, body and mind.

Number of sites

10

Plans for 2021

We want to develop a more agile, scaled back company focused on developing 1610 people, offering a clear and consistent approach to the delivery of wellbeing in the communities using our facilities.

MD: Tim Nightingale



Professional background

Over the last 29 years, I have performed a range of facility management, community development and senior management roles in sport, leisure and community services.

How might the industry look in 2022?

I believe the next 18 months will see more people exercising. In 2022 I think it will be less about the price of the activity and more about the quality of personal interaction and the delivery of services. I expect to see further growth in outdoor, online and home fitness, but group exercise and swimming will return to popularity.

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 2021

Continue to grow and enhance our digital activity to influence physical behaviour through our app and on demand platforms.

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.

How might the industry look in 2022?

More hybrid models, more alignment between healthcare providers and physical activity providers, with an increase in using exercise as the best medicine and our industry gaining more influence among policy decision makers.

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

175+ 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 2021

Showcase the sector's ability to bounce back resiliently and improve the health of the nation. Make healthy happen for our members and franchisees by supporting all aspects of their health.

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.

How might the industry look in 2022?

Virtual and physical fitness will become further linked and complement each other. The pandemic dramatically accelerated the rise of virtual fitness but also showed how essential bricks and mortar facilities are.

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

70 health clubs, 47 spas and four hotels.

Plans for 2021

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!

Be Military Fit

Grosvenor Arch, Battersea Power Station, London SW118AB

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

Company profile

BMF with Bear Grylls is the UK's largest outdoor fitness franchise, delivering fitness outdoor, online and at urban locations. Our Train Anywhere method allows BMF members to stay active and achieve goals anywhere. We pride ourselves on customer service, with an NPS of 73%.

Number of sites

84 franchise locations.

Plans for 2021

First international franchise locations will open in the US and Europe. The BMF Urban system will continue to grow across cities in the UK and BMF Online services will continue to expand.

MD: Tommy Matthews



Professional background

Before joining Be Military Fit in May 2018, I 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.

How might the industry look in 2022?

Customers will want more variety and fitness on their own terms, they will look for local and online communities which train together and, as their working habits adjust, companies which offer training in different locations.

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, including leisure centres, sporting venues, theatres, entertainment, conference and exhibition facilities, play and climbing attractions, cafés and bars.

Plans for 2021

Continued business recovery, investment in digital offerings, including an exercise on demand platform.

CEO: Chris Symons



Professional background

I have more than 30 years' experience in leisure – primarily growth and strategy in the local authority and trust sectors. An alumni of the London Business School, I hold an Executive MBA, and am a trustee of Colombo Sports Centre Trust.

How might the industry look in 2022?

Hybrid events and fitness utilising digital streaming platforms. Leaner organisations with an even greater emphasis on data-led decision making, more personalised customer engagement and employee health and wellbeing. A tough start but blossoming in the autumn!

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 2021

Like everyone else in the sector, we have been planning and preparing for post lockdown recovery and will be focusing on delivering this while looking to acquire new sites, contracts and service partners.

CEO: Mark Crutchley



Professional background

A graduate with 30 years' leisure experience from the ground floor up, I 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.

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 2021

Maximise opportunities at our extreme sport site and develop local strategic partnerships to benefit the community.

MD: Rebecca Hemmant



Professional background

I've worked in the leisure industry for more than 30 years, joining Dacorum Sports Trust in 1984, working in various roles including operations director and now as MD.

How might the industry look in 2022?

I believe there will be a huge opportunity for the industry in terms of the positive recognition and personal impact which health and wellbeing activities can have on individuals, so we need to ensure we offer the right mix of activities to our communities.

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 660,000 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 23 clubs in mainland Europe.

Plans for 2021

Continued expansion across the UK and rest of Europe.

Chair: Russell Barnes



Professional background

My career has always been with the leisure sector. I previously worked at Merlin Entertainments before moving to DLL in 2015 and taking over as chair this year. My focus has always been on creating value driven people cultures which deliver strong results through empowered and talented teams. A clear strategy, which balances the ongoing improvement of the core product, with customer insight will drive continual customer satisfaction, allowing the business to manage its income streams proactively. Work should also be fun and exciting!

Edinburgh Leisure

Craiglockhart Leisure & Tennis Centre,
177 Colinton Rd, Edinburgh EH14 1BZ

Email askus@edinburghleisure.co.uk

Web www.edinburghleisure.co.uk

Company profile

Established in 1998, Edinburgh Leisure is a charity dedicated to making a positive difference, we passionately believe in the positive impact physical activity and sport can have on health and wellbeing.

Number of sites

30+: 10 pools and 6 golf clubs, 14 gyms, one climbing centre. Manage community access to sports facilities in 22 of Edinburgh Council's high schools.

Plans for 2021

To continue to inspire people to get active, stay active and achieve more through our wide provision of opportunities.

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.

How might the industry look in 2022?

Our industry changes people's lives for the good, so I hope there will be greater recognition of the power of physical activity and the work we do to support health and wellbeing.



énergie Fitness

Tel 03330 151 865

Email info@energiecentral.com

Web www.energiefitness.com

Company profile

The leading UK low-cost gym franchise business with more than 100 sites in the UK and Ireland. Through its scalable franchise model, énergie has empowered people to transform their lives.

Number of sites

101 clubs

Plans for 2021

To continue to grow the estate of high service, low cost, small box clubs. Since the end of lockdown 1, énergie has opened 18 clubs and has more in the pipeline for this year. During 2021, we will be developing an omnichannel approach to our member experience, incorporating indoor, outdoor and online.

CEO: Neil King

Professional background

I've spent 25 years in the UK and European public and private sectors, and previously sat on the board for ukactive. I joined énergie in 2018 and led the rebranding to the current énergie fitness product.

How might the industry look in 2022?

The sector will recover strongly, but members will have enhanced expectations around online offerings and hygiene protocols, which we will need to respond to. As some members will be nervous about exercising indoors, we are developing an outdoor fitness offering.



Everyone Active

2 Watling Drive, Sketchley Meadows, Hinckley, LE10 3EY

Tel +44 (0)1455 890508

Web www.everyoneactive.com

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 authority partners.

Number of sites

190+ leisure facilities with more than 60 local authorities

Plans for 2021

It will be all about recovery - working closely with local authority clients and partners to give confidence to customers to safely return to facilities. Re-establish our activity plans, coaching courses and tuition programmes.

MD: David Bibby



Professional background

I'm a chartered accountant and joined Everyone Active as finance director in 1992 and was promoted to MD in 2006.

It has been highly rewarding to see the brand develop.

How might the industry look in 2022?

People have been made more conscious about the importance of their health, which gives us an opportunity to promote the benefits of physical activity. We will see a wider range of people using our facilities, if we can meet their needs - using our physical and digital offerings - then we could build a much broader industry.

Everlast

Unit A, Brook Park East, Shirebrook NG208RY

Tel +344 245 9200

Web www.everlastfitnessclubs.com

Company profile

Everlast Fitness clubs are part of the Frasers Group whose portfolio includes Sports Direct and the luxury brand Flannels. Following the acquisition of DW in August 2020 we have more than 70 sites. As an icon of both training and training equipment, Everlast promise the best modern facilities at the lowest price possible empowering as many people as possible to discover that "Greatness is Within."

Number of sites

72

Plans for 2021

Embrace the changes and continue to go from strength to strength.

MD: Mel Crossland



Professional background

I have worked in the leisure industry all my career, starting my journey with the JJB team as regional sales manager, spending a number of years with DW Sports Fitness and joining the Frasers Group in 2014 as head of commercial before moving into my current role.

How might the industry look in 2022?

People are recognising how exercise plays a key role in physical and mental health. There's a real sense of optimism in the industry, but we will have to maintain trust with enhanced cleaning and social distancing.

Everybody Sport and Recreation

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

Email support@everybody.freshdesk.com

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 16 leisure facilities, including the brand new Everybody@Alderley Park facility the Everybody Academy training provider in-house catering and hospitality arm, Taste for Life.

Number of sites

16

Plans for 2021

Refurbishment of Congleton Leisure Centre and, in partnership with Cheshire East Council, strategic investment into the leisure facilities in Nantwich, Poynton, Middlewich, Knutsford and Wilmslow.

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.

How might the industry look in 2022?

Hopefully from summer 2021 the industry will be able to offer services to users at full capacity. Virtual fitness will continue to grow in popularity: we will be offering live and on demand fitness via our Everybody@Home platform.

Fusion Lifestyle

Minerva House, 5 Montague Close, London SE19BB

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 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

70 sports, leisure and community centres in the UK.

Plans for 2021

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.

How might the industry look in 2022?

There's no doubt that 2021 will be tough, but I'm optimistic that the market will have returned by 2022 and that our sector will be ready to take on the opportunities which will undoubtedly arise.

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, including Glasgow Club. The largest not-for-profit leisure provider in the country.

Number of sites

More than 100 across the city, including the Sir Chris Hoy Velodrome, Emirates Arena, and the Glasgow BMX Centre.

Plans for 2021

Make and retain connections with those who are most disengaged in our communities. For those who aren't ready to return to the gym yet, we will continue to grow and develop our Glasgow Club Online membership.

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.

How might the industry look in 2022?

As the industry moves back to a more normal model in 2021 and beyond, many people won't be able to, or want to, return to the way they lived their lives before, so we need to think about how we continue to deliver services both digitally and in person.

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

The UK's foremost charitable social enterprise operating leisure and cultural services in partnership with councils, third sector bodies and in wholly owned mode. In 2020, GLL pivoted to a hybrid model, offering a Better@Home exercise and wellness programme via our rebooted Better UK App, plus inspiration through our Better podcasts.

Number of sites

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

Plans for 2021

Further investment in the customer experience, re-activating sedentary populations to tackle health inequalities and launch our new whole community Better Health products to spearhead the nation's recovery.

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.

How might the industry look in 2022?

Consolidation of players. Success will be for those who can serve - and reinvest in - the wellbeing of everyone.

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

Twitter @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

186 gyms.

Plans for 2021

Focus on member recovery and growth.

CEO: Richard Darwin



Professional background

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

How might the industry look in 2022?

We expect 2022 to be a year of recovery for the industry.

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 2021

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.

How might the industry look in 2022?

We'll see a huge improvement to bricks and mortar offerings as operators realise the need to continually improve the customer experience. Digital fitness offerings will continue to evolve and be part of ongoing strategy.

gymphobics (Licence) Ltd

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

Tel +44 (0)1785 227273
Email admin@gymphobics.co.uk
Web www.gymphobics.co.uk

Company profile

Gymphobics 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 2021

Get our gyms back in action and members returning.

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 Gymphobics franchise and in 2012 won the Fitness Industry Association's highest individual award for contributing most to the future of fitness in the UK.

How might the industry look in 2022?

With government, the media and the medical profession extolling the need to lead a healthy lifestyle, we can expect a boom for the industry, with more 50+ members.

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 2021

The main challenge is to reopen and build back up to pre 2020 levels of service and provision for our communities.

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.

How might the industry look in 2022?

The challenges of the last 18 months have forced many operators to reflect on what it is we want to achieve and once we get past the survival mode of operating this may then open up different opportunities. However I am not convinced there will be a sector-wide reset.

Impulse Leisure

Head office – Blackshots Leisure Centre,
Blackshots Lane, Grays, Essex, RM16 2JU

Tel +44 (0)7786 733328
Email khayes@impulseleisure.co.uk
Web www.impulseleisure.co.uk

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 four leisure facilities, an entertainment venue and an 18 hole golf course and pitches in Essex.

Plans for 2021

Covid recovery and grow the business.

CEO: Karl Hayes



Professional background

I have 34 years' experience in the leisure sector, starting as a lifeguard then broadening my career experience across entertainment, catering and marketing, delivering at every level before becoming the MD of Impulse Leisure.

How might the industry look in 2022?

Virtual delivery methods, coupled with advances in technology will play a massive part in reshaping leisure, while increasing accessibility and uptake. Face to face will be reliant on high standards and quality of service.

JD Gyms

Anjou Boulevard, Robin Park, Wigan WN5 0UJ

Tel +44 (0)1942 914914
Web www.jdgyms.co.uk
Facebook JD Gyms
Twitter @jdgyms

Company profile

The JD Gyms Group has more than doubled in size in the last year following the acquisition of Xercise4Less, some of which have already been converted to JD Gyms with more to follow. JD Gyms seriously stylish, seriously affordable offering continues to combine premium equipment, high-quality group exercise provision, impeccable standards and cutting-edge interior design.

Number of sites

70 plus 10 committed for 2021.

Plans for 2021

Continue to grow the JD Gyms estate through further acquisitions and our organic pipeline.

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.

How might the industry look in 2022?

I'm confident there will be a buoyant return for the sector as more people than ever look to make regular exercise part of their weekly routine.

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 almost 40 years' experience, Lifestyle Fitness has become a leading operator of sports and fitness facilities, primarily in association with local partners, such as colleges, schools, academies and property developers. We offer a high quality fit-out, best in class member experience and flexible commercial revenue-sharing partnerships.

Number of sites

30 across the UK.

Plans for 2021

Implementing new sites and further developing our pipeline of opportunities.

Chair: James Lawrence



Professional background

Over 10 years' experience in the health and fitness sector. I became MD for Lifestyle Fitness in 2019. Prior to this, I founded two start-up businesses within the leisure sector and gained a first in Economics & Banking.

How might the industry look in 2022?

A growth in flexercising will see consumers interchange their chosen place to train between home, a health club or studio and the outdoors. Consequently, consumers will expect more from the experience when visiting a facility. More will use a digital platform to enrich their workout.

Link4Life/ Your Trust

Floor 3, Number One Riverside, Smith Street

Rochdale, OL16 1XU

Tel +44 (0)1706 926 232

Web www.link4life.org

Facebook /yourLink4Life

Company profile

A charity in the heart of the Rochdale Borough community, our vision is to support communities to be active, creative and healthy. We deliver high quality, enjoyable, affordable and accessible culture and leisure.

Number of sites

Nine sites.

Plans for 2021

As part of our renewal programme, we are rebranding as a charity, as we look to build on our community work over the course of the pandemic. We are transforming our centres into Wellbeing Centres and developing our staff on a range of health interventions to better deliver on the health agenda in a collaborative way.

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.

How might the industry look in 2022?

By 2022 we expect to see the wellbeing agenda firmly embedded as the core purpose for our sector, with many more services offered within centres and communities to support people to live more active and healthy lives.

Mytime Active

High Elms Golf Club, High Elms Road, Downe, Orpington BR67JL

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 through four pathways: be active, eat well, be positive and be together. We understand our customers and make it easy for them to access a range of activities from gyms, to golf and swimming, weight management and soft play in our vibrant, inclusive and social spaces.

Number of sites

17 leisure centres and golf courses.

Plans for 2021

To drive our #missionwellbeing, to recover and grow our customer base, to build back our financial resilience.

CEO: Marg Mayne



Professional Background

With 20 years' experience at board level, as FD and CEO, 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.

How might the industry look in 2022?

Covid has brought home the importance of exercise and nutrition for physical and mental health, so as people invest in themselves, the overall market will grow. New and old customers will demand a physical, virtual, social offer.

Mosaic Spa & Health Clubs

Fitness Express, Park Farm, Hethersett, Norwich, NR9 3DL

Tel +44 (0)1603 812 727

Web www.mosaicgroup.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

19

Plans for 2021

We are looking to acquire our third freehold site and to rebuild the contract management business after the effects of the pandemic. We are evolving our range of support services, improving the digital experience and investing in the development of our freehold sites.

MD: Dave Courteen



Professional background

I set up Mosaic with co-founder Steve Taylor, straight from university and have been involved with various industry bodies and spoken at numerous conferences in the spa and health club sector. Currently vice chair of ukactive Members Council and chair of the Marches Growth Hub.

How might the industry look in 2022?

I think we will bounce back strongly with potentially more members collectively than we had pre-pandemic. There will be some consolidation of brands inevitably and more boutique clubs as part of the remodelling of high streets.

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, our experts have been working together to make the nation fitter, healthier, happier and stronger. 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, 113 fitness and wellbeing centres, 150+ workplace wellbeing sites, 5 medical centres and 1 diagnostic suite.

Plans for 2021

To rebuild 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.

How might the industry look in 2022?

A resurgent fitness market will capitalise on an increased public focus on health and wellbeing, while offering a blend of face to face and virtual services.

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 golf courses and visitor attraction facilities, including country parks.

Number of sites

More than 80 sites, including 60+ gyms.

Plans for 2021

Continue to work collaboratively with our local authority partners to drive improved mental and physical wellbeing in the communities we serve..

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.

How might the industry look in 2022?

We will become even more focused on putting the customer first based on individual wants, desires and interests. Underpinning this, data and insight will be at the heart of our decision making.

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. We're a leading leisure and wellness partner, passionate about all things fitness, sport, health and wellbeing related. We work in partnership to re-imagine community leisure provision and drive social value.

Number of sites

More than 100 leisure centres and gyms.

Plans for 2021

Our focus remains on the opportunity to deliver prescription exercise and a broader spectrum of health and wellbeing services, always prioritising the reassurances our customers and partners require at a challenging time.

CEO: Paul McPartlan



Professional background

I joined Places Leisure in August 2020. A graduate of Oxford Brookes University, much of my early career was in leisure, hospitality and wellness. Most recently I was national operations director for Nuffield Health.

How might the industry look in 2022?

The sector will take time to recover but the long term prospects should be positive. We have a wellbeing product which will be in high demand. If we keep exceptional standards and broaden our offering, the future looks bright.

PureGym

Town Centre House, The Merrion Centre, Leeds, LS2 8LY

Tel +44 (0)113 831 3333
Email info@puregym.com
Web www.puregym.com

Company profile

Founded in 2009, PureGym pioneered the model for affordable, flexible, high-quality fitness clubs. 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 and Switzerland.

Number of sites

280+ (UK); 500+ (UK and Europe).

Plans for 2021

To welcome members back into our gyms at last! Open around 20 sites across the UK and build on the strong organic growth we were generating pre-pandemic.

CEO: Humphrey Cobbold



Professional background

Previously CEO of online cycle and triathlon goods retailer Wiggle. Grew Wiggle's international business in Europe, 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.

How might the industry look in 2022?

Strong. The gym sector is resilient and the demand for fitness facilities will be even higher following the pandemic. I'm confident we'll be back to full strength by 2022.

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 2021

With 2020 causing such seismic change in our sector, we are hoping to get back permanently to what we love to do and find ways to delight our members.

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.

How might the industry look in 2022?

Short term liquidity will inevitably impact on the sector after the long shutdowns and there will be casualties but it will also bring opportunity and I'm confident that with our great people and compelling proposition we can thrive. Online will add value for our audience.

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 2021

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.

How might the industry look in 2022?

Our products need to be more versatile and incorporate onsite and home solutions while still creating a wellbeing hub to bring people together.

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 2021

Reopen all venues and help communities recover, embracing innovative technology to make accessing health and wellbeing services easier for everyone.

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.

How might the industry look in 2022?

There will be a greater blend of in person and virtual and on demand based solutions to improve health and wellbeing.

Ten Health & Fitness

2-4 Exmoor Street, London W106BD

Tel +44 (0)20 7637 0555
Email info@ten.co.uk
Web ten.co.uk

Company profile

Ten is one of the pioneers of the boutique fitness sector and London's only premium provider to bridge the gap between the world of fitness and the medical sector. Ten offers Dynamic Reformer Pilates, 1-1 sessions, physiotherapy, massage and clinical exercise - bespoke and evidence-driven exercise prescription for clients with a life-altering clinical need including cancer and diabetes.

Number of sites

10

Plans for 2021

Stabilising the business and re-engaging with our growth plans, with more sites in the pipeline.

CEO: Joanne Matthews



Professional background

My background is in marketing and strategy at Habitat and Austin Reed. A car accident inspired me to create Ten Health & Fitness. I also sit on the board of MSKPN a body dedicated to improving the outcomes and customer experience within private musculoskeletal practises.

How might the industry look in 2022?

More players, more acquisitions and some consolidation, we will do more to develop communities rather than just a customer base and develop a seamless and brand-aligned approach to digital and tech.

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 aimed at those who value quality and customer service. It was formed in 2004 as a result of an MBO of Clubhaus.

Number of sites

15 golf and country clubs in the UK

Plans for 2021

Increase our customer and people focused initiatives with investment in digital, F&B and in-club customer experiences, such as more studio classes and workplace hubs. Increasing the number of lodges at our clubs and exploring more acquisitions.

CEO: Richard Calvert



Professional background

I have over 30 years experience in the leisure and travel business, starting at the coal face as an overseas ski rep and progressed through the industry, with senior roles at companies such as Thomas Cook and Tui. Have also worked in the US. Joined The Club Company in December 2021.

Best piece of advice you've been given?

Control the controllable.

People may be surprised to know...

I speak Welsh and Spanish and used to be a ski guide.

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 Soho, Third Space is a ground-breaking group of unique spaces dedicated to training for life, seeing true health as diverse, individual and long term. We combine world-class facilities and expertise with a bespoke approach, catering for every health and fitness need - training, medical, recovery and nutrition.

Number of sites

Six.

Plans for 2021

Time to turn off the pause button and take advantage of the roaring 20s. We will open our seventh site in Mayfair and start building our eighth and ninth sites.

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.

How might the industry look in 2022?

We'll see a resurgent and confident industry. All the bigger players will offer a hybrid solution, but real life will remain the best and we will seek inspiring, social experiences.

TM Active

1-5 Martin Square, Larkfield, Aylesford, Kent, ME20 6QL

Tel +44 (0)1732 876150

Web www.tmactive.co.uk.

Company profile

TM Active was formed in 2013 as an independent charitable trust operating leisure facilities in the borough. The trust has a turnover of £7.2m and more than one million customers a year. Our mission is to create a clean, safe and happy health and social wellbeing experience. We are focused on the national agenda, delivered locally.

Number of sites

5

Plans for 2021

Integrate a new sports park facility into the brand and complete the transfer of Country Park into the portfolio. Rebrand and relaunch the catering offer. Focus on business recovery and ensuring a sustainable future.

CEO: Martin Guyton



Professional background

I have more than 40 years experience in the industry, starting as a lifeguard at my local pool. I have an MBA, work as a Quest Assessor and have chaired the Sout East Leisure Operators network for 15 years.

How might the industry look in 2022?

Operators should be taking advantage of the opportunity created by an increase in public health awareness to reposition their offering to work as health and wellbeing organisations, alongside primary health, to meet the need for a fitter and healthier nation.

TRIB3 International

Unit 3A North Pavilion, Symphony Park, Manchester, M1 7FS

Email franchise@trib3.co.uk

Web 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, underpinned by performance tracking technology with a custom shake bar and retail offering.

Number of sites

12 across UK, Spain, Finland, Russia and China.

Plans for 2021

With several new international markets in the pipeline, including the Netherlands, we will have more than 30 stores globally by the 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 1Rebel. TRIB3's vision is to deliver a unique and next-level workout experience that brings people together.

How might the industry look in 2022?

Booming! The sector will be at its highest peak, with more people having physical activity and health firmly on the agenda and online classes helping to drive participation.

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 not for profit community leisure trust with a vision for everyone in West Lothian to live healthier, happier and longer lives. Best assessed operator in Scotland in 2020 TRP Membership Experience Awards. We run Xcite venues, outdoor facilities, golf courses, local schools, arts and cultural centre, outreach and online services.

Number of sites

19

Plans for 2021

Implement plans for business recovery to return to pre-Covid business activity levels. Launch new membership products, develop online services to support the inactive and build on our reputation for excellent customer service.

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 held senior roles with EventScotland, PMP Consultancy, Midlothian Council and Bannatyne's Fitness.

How might the industry look in 2022?

The importance of health and wellbeing now has greater priority than ever before with people and governments. The new skills the industry has developed in 2020/21 will make us better equipped to inspire the inactive population.

You Fit

1 Towers Place, Richmond, Surrey, TW9 1EG

Tel +44 (0)208 334 4830
Email justin.andrews@youfitclubs.co.uk
Web youfitclubs.co.uk

Company profile

You Fit is a chain of hotel based health and leisure clubs across the UK which include both wet and dry-side health and leisure facilities. It is owned and operated by Kew Green Group which operates full service hotels in the UK, Europe and Asia.

Number of sites

22 health clubs and leisure clubs. 18 hotel gyms.

Plans for 2021

Alongside increasing the numbers of hotel clubs through new Kew Green hotel management contracts in the UK and Europe, You Fit is independently increasing its portfolio of clubs with new club management packages and franchise opportunities.

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 and launching the You Fit brand in 2018.

How might the industry look in 2022?

The pandemic has created an awareness of the value of exercise which will lead to longer term positive behaviour changes in the population, resulting in an uplift in active lifestyles, which will benefit the industry across all sectors.

Your Leisure Kent Ltd

Discovery Park, Innovation House, Innovation Way, Sandwich, Kent, CT13 9ND

Tel +44 (0)3333 660 661
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

7.

Plans for 2021

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

I have more than 30 years' experience in the leisure industry within the private, public and trust sector organisations, supported by professional qualifications in management and marketing.

How might the industry look in 2022?

Rebounded from the pandemic with a stronger connection between leisure, health and communities.

Snap Fitness

G03 The Lightbulb, London SW18 4GQ

Web www.snapfitness.com/uk

Company profile

A 24/7 concept established in 2003, owned by Lift Brands, we provide the latest in fitness technology, diverse workout options and a supportive community.

Number of sites

1000 across the globe

Plans for 2020

Informed by a global research project into what members want, we have formulated a repositioning strategy which expands beyond existing gym goers to reach 85 per cent of the UK population who are not yet gym members. We're investing in technology, including an app, which will help our members stay motivated and focused.

CEO Lift Brands: Jon Cottam



Professional background

After starting out in PT, I have worked in management positions with a number of high profile brands including Virgin Active and LA Fitness. I joined Lift Brands in 2017 as MD of 9Round UK, before becoming EMEA CEO last October.

How might the industry look in 2022?

The pandemic has made us think about how exercise makes us feel as well as look, which will change how brands speak. Gyms will need to adapt to ensure they remain relevant and offer holistic experiences which are both supportive and encouraging.



LEADERSHIP CIRCLE

An incredible group of market leading companies working together to innovate, strengthen and champion excellence across Asia-Pacific's health, fitness and wellness industry. Some of our members include Accor, Body Fit Training, ClassPass, Collective Wellness Group, Core Health & Fitness, EVOLT, Evolution Wellness, Exerp, Technogym, Fitness & Lifestyle Group, Intelivideo, KX Pilates, Les Mills, Life Fitness, Mindbody, NASM, Orangetheory Fitness, PURE Group, Snap Fitness, Therabody, True Group, TRX, UBX, Uscreen, Virgin Active, Viva Leisure, Wexer and more.

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thefitsummit.com/leadership-circle/

HCM

HANDBOOK

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

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.fitnes

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 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 2021

To keep building membership at our clubs.

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.

How might the industry look in 2022?

The Bulgarian fitness market is still building and more people are joining clubs, having realised that being fit increases their immunity to viruses and diseases.

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 2021

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 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 905 clubs and 2 million members.

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.

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

More than 40 clubs in Norway, plus 6 in Germany, 2 in Austria and 11 in Switzerland as part of a franchise deal with Holmes Place and a Finnish franchise with 25 clubs.

Plans for 2021

We plan to open six clubs and operate 50 by the end of the year.

CEO: Morten Hellevang



Professional background

CEO of Fitness Group Nordic since December 2013, I 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.

How might the industry look in 2022?

We will still be recovering from Covid. The strong operators will have got stronger and the weak will have disappeared.

Genae Fitness Club

332 avenue du Général de Gaulle, 69500 Bron, France

Email anthony.barquisseau@genaclub.com
Web www.genaclub.com

Company profile

A specialist in sports, travel, media, leisure and restaurants, Genai Fitness Clubs is co-owned by Anthony Barquisseau and private equity 123IM. 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 2021

Implement the lessons learned in the crisis. Launch Genae TV, a rental service and invest in our clubs.

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.

How might the industry look in 2022?

I think 2022 will get back to normal slowly and people will look for social interaction more than ever. It will be the strong clubs which will have the staying power.

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 2021

Expanding the boutique studio TRIB3.

CEO: Jonathan Fisher



Professional background

I 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, I co-founded EVO Europe in 2015, founded ICON in 2016 and assumed the role of chair of TRIB3 International in 2019.

How might the industry look in 2022?

Companies with clearly defined strategies will experience robust growth, but those struggling to find their place in the increasingly multi-channel sector will lose ground.

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

370 clubs in 6 countries.

Plans for 2021

Opening new franchise-owned and operated clubs. Combining hyper-personalised workouts with group training at our clubs. Further development of our hybrid model. with online training and live classes.

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.

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 2021

Further development of our digital service including the collaboration with My Gym, as well as on demand classes with SBarre, Burn it and Yoga Fusion. Personal 20 also launched the P20 home functional strength programme.

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.

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 fitness centres and spas across Spain and one in Nice, its first international opening since the end of 2019. Its hallmarks are top-quality design, areas devoted to relaxation and health and high quality service.

Number of sites

24

Plans for 2021

We will open one site in San Sebastian and during 2022/3 we have plans for five sites in Spain and one in Colombia.

CEO: Javier Pellón



Professional background

I have a Bachelor of Law from the IE Madrid and an MBA from the London Business School. Founder of BSR in 1985, Llefisa in 1987, followed by Metropolitan Spain in 1989.

How do you think the industry will look in 2022?

After the terrible situation we have been living in this last two years, the fitness industry will slowly return to pre-pandemic figures. Although members will come back to facilities, most companies will face strong financial difficulties, leading to mergers and acquisitions and a bigger concentration of the market.

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 121 and small group training. Members receive ongoing 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

11

Plans for 2021

We will open our second club in Hamburg and establish multichannel training offers inside, outside and online.

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 Prime Time Fitness, opening the first club in October in 2010.

How might the industry look in 2022?

We will be looking for expansion opportunities in 2022, we believe our premium training business model is well positioned for members who need guidance to workout.



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FRANCHISES

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FRANCHISE SECTOR

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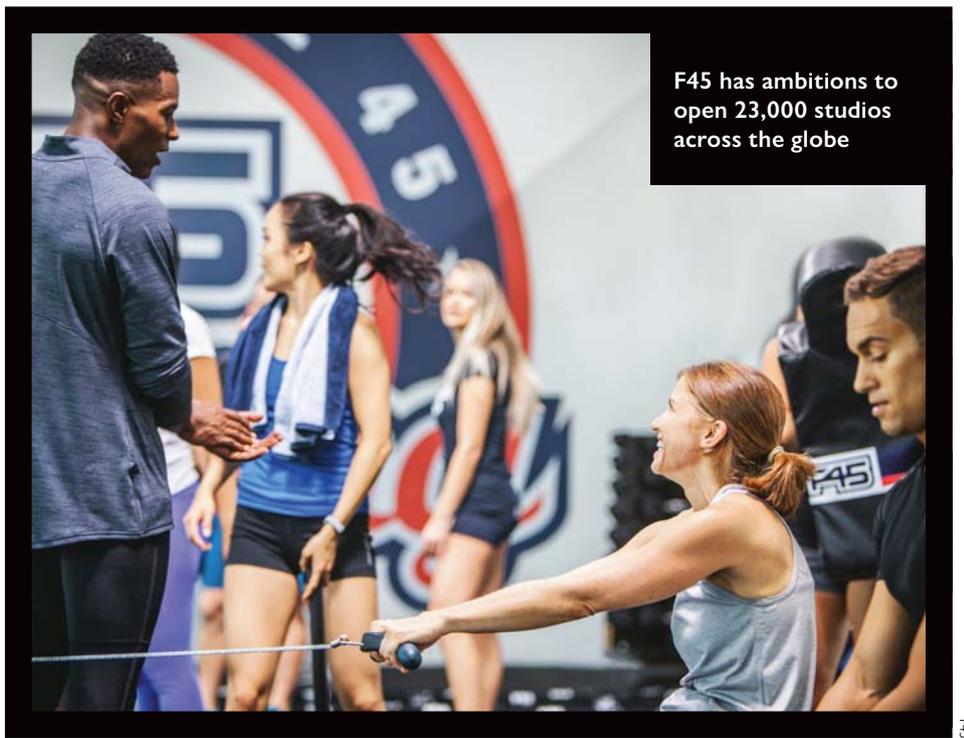
TRIB3 has hit the ground running post lockdown with its most successful pre-sell in Edinburgh

FACING THE FUTURE

Outdoor sessions, digital workouts and plans for expansion, Emma Canning speaks to some of the franchise companies about how they have responded to the pandemic disruption and what is coming down the tracks...



TRIB3 / HOVE & CO PHOTOGRAPHY



F45 has ambitions to open 23,000 studios across the globe

F45

Out of all challenges come opportunities and Rise is a fledgling franchise company which has spotted an opportunity as a result of Covid. A franchise model which incorporates indoor, outdoor and online elements, workout sessions have been designed for parks, open green spaces and other community areas, including indoor venues.

Rise isn't burdened by pre-COVID thinking. The venture is the brainchild of a group of fitness professionals, James Cotton, Andy Kay, Mhairi Fitzpatrick and Carl Smith.

"Rise is brand new and created to fill an emerging gap in the fitness sector," says Cotton. "This means we don't have a load of locations to boast about or a million followers on Instagram, but it does mean early franchisees will

get the pick of locations and the best deal to get into business quickly."

Workouts are designed to build fitness and confidence while an online element is delivered via Rise's own app, which features personalised daily advice, motivational comments, and access to digital workouts.

Not only is this new franchise looking to fill a gap, but the team are also prepared for whatever the future brings: "Rise needs to be in the heart of the community," says Cotton. "Because it has outdoor, indoor, and digital provision, franchises will be able to operate through the next major disruptor like COVID-19 which comes along."

Pivot to digital

For boutique studio operator, TRIB3, the last year has seen the company expand with new stores, new locations, new partners and a new franchise deal.

TRIB3 already has sites in the UK,

Spain, Finland, and Russia and will open in the Netherlands next year, marking its sixth international territory. This was followed by the launch of the first site in Scotland, in May. Three more are in the pipeline for this year.

Edinburgh's "industrial-luxe" store is one of the largest in the TRIB3 portfolio, with capacity to offer 45-minute HIIT workouts to 48 exercisers. Launched after lockdown 3.0, it was the company's most successful ever pre-sell. TRIB3 has already remodelled studios to allow for a minimum of 1.5m spacing as it's what people want.

While COVID didn't halt the opening of new sites, it did change the way they operated. "We launched live streaming – TRIB3 Live – during lockdown," says founder, Kevin Yates. "We mobilised the team and within four weeks we'd built a TRIB3 Live studio and platform, with a full production team." ▶

“Members will have enhanced expectations. So it will be important for operators like us to maintain and improve our online offer.”

Neil King, énergie Fitness managing director



énergie Fitness is pushing for growth this year

► **Omnichannel approach**

Franchise investment business, Empowered Brands, is also looking to Europe for its next round of expansion. The plan is to accelerate the roll-out of its four key brands while also acquiring new businesses for the portfolio, which already includes énergie Fitness.

There are now more than 100 énergie gyms in the UK and Ireland, with more slated to open this year. énergie Fitness managing director, Neil King, says the company will continue to drive the growth of its high service, low-cost, small-box gyms as well as develop its omnichannel approach – indoor:outdoor:online.

“As a result of Covid, members will have enhanced expectations,” says King. “So it will be important for operators like us to maintain and improve our online offer. While most people will be happy to resume exercising indoors, a percentage will be nervous and so our outdoor fitness offering will complement what we do in club and online.”

Aggressive expansion

Part-owned by actor, Mark Wahlberg, Australian HIIT chain, F45 Training, is looking to grow rapidly and expand on its current number of 1,500 studios in 63 countries.

The franchised studio operator filed a notification to list on the New York

Stock Exchange. While no date has been announced for the initial public offering (IPO), the filing is said to state plans to open up to 7,000 studios on the US and 23,000 globally.

The filing offers an insight into the effects of the pandemic. Between 1 February 2020 and 31 March 2021, a total of 15 F45 studios permanently closed, representing less than 1 per cent of its total number of studios. It also saw revenues decrease to \$82.3m for 2020 compared to \$92.7m for 2019.

Connecting with members

With more than 1000 clubs across the globe, the last year has provided time for Snap Fitness to reflect and assess its position in the increasingly competitive fitness market. During this time the company has conducted a global research project to further understand customer needs, as well as to reach out to the 85 per cent of the population who don't have a gym membership.

"The pandemic made us all take a step back and evaluate our mental, physical, and emotional health, it's no longer about how we look but how exercise makes us feel," says CEO, Jon Cottam. "Technology has increased,

"The pandemic made us all take a step back and evaluate our mental, physical, and emotional health, it's no longer about how we look but how exercise makes us feel."

Jon Cottam, Snap Fitness, CEO



gyms will need to adapt and offer holistic experiences which are more supportive and encouraging. We are investing heavily in technology, which will help our members stay motivated and focused on their fitness journeys, as well as provide us with the data to be truly supportive to both members and franchisees."

Cottam says Snap will also be communicating to members that general activity is as important as focused workouts: "We believe all fitness is valid fitness, whether our members are working out at our clubs or at their houses, getting steps in while running errands or doing yoga in the park."

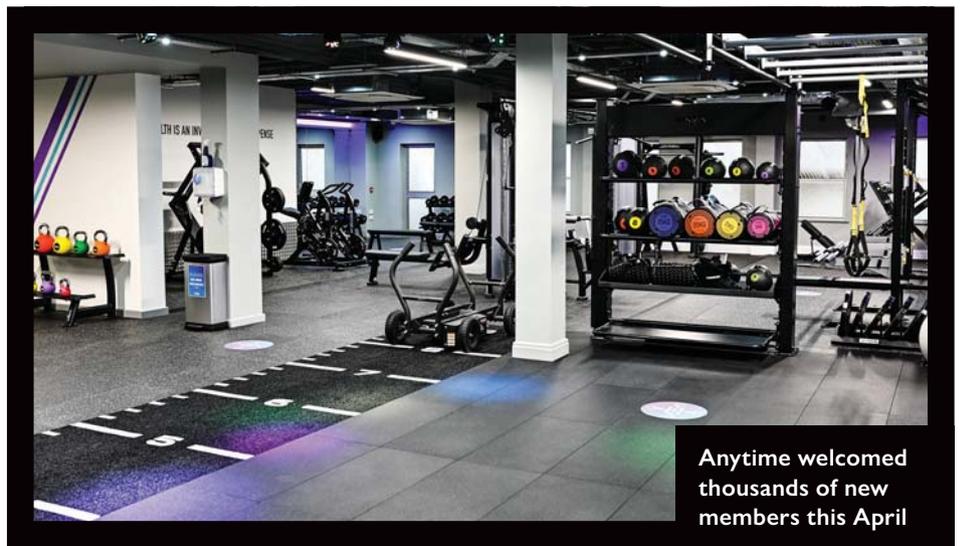
Engaging content

Despite the many pressures of the last 18 months, there are signs things are moving forward once again. Anytime Fitness UK revealed April was its busiest month for new memberships since it began trading in the UK in 2010, reporting tens of thousands of new members.

This was achieved despite clubs in England opened 12 days into the month, those in Scotland and Northern Ireland opened in the last week of April and Welsh clubs remained closed entirely.

Anytime Fitness CEO, Neil Randall, says the company is still on track to exceed targets for new franchised territories and new club openings in 2021 and the pandemic gave the company the chance to accelerate other important projects, including the online member platform, AF Connect Online and the Panel of Health, a range of experts who provide engaging health content for members.

The last year has been difficult but the franchise companies are now looking optimistically to the future, responding to challenges and reframing their models in order to meet customer needs and broaden the reach. ●



Anytime welcomed thousands of new members this April

ANYTIME FITNESS



Empowered Brands

...exists for the sole purpose of empowering people to transform their lives

Empowered Brands has leveraged more than 18 years of franchising experience to build a health and fitness and well-being brand community. Owners of the énergie fitness business, we are experts in the UK fitness franchise sector ranked number three in the elite franchise top 100 UK franchises for 2021. Winners of multiple awards including HSBC franchise awards 2019 for Brand Awareness and Innovation.

We work exclusively on entrepreneur led business models. Our established and emerging brands enable talented entrepreneurs with a desire to differentiate their service offer, to build affordable fitness clubs or to enter the dynamic boutique fitness market in order to grow and prosper.

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Get in touch

@ info@empoweredbrands.co.uk

www.empoweredbrands.co.uk

énergie Fitness

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Email: franchise@energiecentral.com

Twitter: <https://twitter.com/effranchiseuk>

LinkedIn: www.linkedin.com/company/energie-fitness

Instagram: www.instagram.com/effranchiseuk/

Facebook: www.facebook.com/effranchiseuk

www.energiefranchise.com



Rob Wolfe

About us

Established in 2003, énergie Fitness (part of Empowered Brands Limited) are experts in the UK fitness franchise sector, ranked #3 in the Elite Franchise 100 Top UK Franchises for 2021 and winner of the British Franchise Association HSBC Franchise Awards 2019 for Brand Awareness & Innovation. énergie is the only fitness franchisor to operate in the low-cost / high-service sector. We have more than 100 sites open and are in presale across the UK, Ireland, Spain, Bahrain and India..

What does the franchise package include?

As a franchisee, you'll be fully supported by a team of expert operators with a proven track record and work alongside our dedicated in-house property acquisition team to secure the right site.

You'll benefit from our relationships with leading industry suppliers, as well as receive performance management and ongoing training.

How much does it cost?

A minimum investment of £120,000, which includes the franchise fee. Additional finance can be provided through the major banks and leasing companies we work with. We help franchisees to build a gym business with a potential value of £0.5m to £1.2m over five years.

Which consumer group/demographic is the franchise targeted at?

énergie attracts a wide range of members, from people taking their first steps into fitness, to savvy exercisers. We do this by combining state-of-the-art exercise equipment, first-class

fitness facilities, including our signature functional training space, The Yard, flexible membership options and world class customer service.

What sort of franchisees are you looking for?

We're looking for people who have a real drive to build their business and aspirations to open multiple sites.

Plans for the next 12 months

We're continuing aggressive expansion plans, domestically and internationally, and have signed a master franchise agreement for the development of énergie Fitness in the Iberia region, as well as opened our first gym in India.

In addition, we are expanding our product range to include indoor, outdoor and online. We already have a great indoor fitness product and during COVID developed a strong online member experience. This year we will add an outdoor fitness programme to our brand.

Key personnel

- Rob Wolfe, Head of Franchise Recruitment
- Neil King, Managing Director

"We did some research online and were impressed straight away with énergie's visual branding, and well-informed website material. We also loved énergie's unique positioning within the market, representing the low-cost, high-service sector. From day one énergie has been there to help us, which is why we opted for a franchise."

Glyn and Nathalie Stephens, owners, énergie Fitness Deeside



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- Perfectly suited to qualified personal trainers

Rise Fitness Franchise

Elms Fitness Group Ltd, t/a RISE Fitness Franchise 46 Hullbridge Road,
South Woodham Ferrers, Chelmsford, Essex CM3 SNG UK

Twitter: <https://twitter.com/risefitnessfran>

LinkedIn: <https://www.linkedin.com/company/76771379/admin>

Instagram: www.instagram.com/risefitnessfranchise/?hl=en

Facebook: <https://www.facebook.com/risefitnessfranchise>

www.risefranchise.org



James Cotton



Carl Smith

About us

RISE is a brand-new franchise created to fill an emerging gap. Outdoor workouts have become popular as pandemic lockdowns and gym closures have made people explore their communities for engaging alternatives.

RISE incorporates group personal training in outdoor exercise sessions with continuous online coaching and support. Members set personalised goals, join challenges, and receive nutritional advice. RISE has heart rate technology at the core, allowing members to work to the correct intensity during training. Our app means our coaches stay connected, build a community and coach members on the days they are not seeing them face-to-face.

What's the main USP of your franchise?

For franchisees, it is a low-cost way to get into business working directly with a team which have launched multiple successful franchise businesses.

For members, it gets results and is the perfect fit for the post lockdown landscape which incorporates more home working and technology.

What does the franchise package include?

You get your own exclusive RISE territory and then we support you to set up every part of your business: the RISE app plus launch marketing, web and social media presence, payment and booking software, and sales training on how to get from enquiry to paying member smoothly. The RISE team is made up of a group of fitness professionals whose careers include tenures at some of the UK's largest operators including Anytime Fitness, LA Fitness and 37°.

How much does it cost?

In response to the current economic landscape, our early adopter franchise fee is low at £5,000. Unlike many fitness franchises RISE does not require you to lease premises or invest high upfront costs. Our focus is on getting franchisees into business fast and getting them to profit.

How many sites do you have?

Our first five franchisees are joining the RISE Team July 2021

What are your expansion plans?

We are focused on the UK and building

a network of 75 – 100 franchisees in the early stages.

Which consumer group/demographic is the concept targeted at?

RISE is an accessible brand which works for all. It is particularly attractive to people who have held gym memberships before but have not achieved the results they wanted. RISE is a wrap around plan that is personal and gets results.

What are the characteristics of the franchisee you're looking to work with?

You get out what you put in. Our franchisees are first and foremost "people-people". They like to interact and they care about the job they are doing. Many of our franchisees are personal trainers who are ready to take their earnings to the next level.

Key personnel

- James Cotton, Managing Director
- Carl Smith, Head of Product
- Mhairi FitzPatrick, Chair and Executive Director
- Andy Kay, Executive Director
- Jeremy Taylor, Executive Director

TRIB3

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FITNESS INDUSTRY?**

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TRIB3 International Ltd

TRIB3 International, North Pavilion, Manchester Circle

Email: franchise@trib3.co.uk

Instagram: <https://www.instagram.com/trib3international>

LinkedIn: <https://www.linkedin.com/company/trib3>

Facebook: <https://www.facebook.com/TRIB3international>

www.trib3.co.uk/franchise.



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's the main USP of your franchise?

Community. TRIB3 was created to bring people together: all our stores feature a lounge area and mixology bar to socialise. 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. The package spans finance, business planning and operations with over 150 hours of dedicated training, as well as property search, lease negotiation, store design and fit out. We offer a seamless digital infrastructure alongside extensive sales, marketing and brand support.

How much does it cost?

A minimum investment of £137,000 is needed. We work with several major banks who can provide financing options with bank funding reducing your required investment by up to 50%. The initial franchise fee is £35,000 which covers a multitude of services to get you started. Once your store is open, the franchise fee is 7% including a 1% contribution for marketing.

How many sites do you have?

With over 30 stores forecasted to be operating by the end of 2021, TRIB3 is already active in more than five international territories including UK, Finland and Spain with eleven stores currently trading across the world and two additional stores opening in Manchester, UK in August 2021, one as part of TRIB3's new global headquarters.

What are your expansion plans?

Primary markets for growth in 2021 are UK & Spain, although new territories Republic of Ireland and the Benelux region were recently brought on board with a franchise area development agreement deal seeing a minimum of

twenty TRIB3 stores to open across the Benelux over the next five years. Several other new international markets are in the pipeline as well.

Which 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 an inclusive and results-driven workouts out there.

What are the characteristics of the franchisee you're looking to work with?

TRIB3 welcomes people with all backgrounds as long as they are passionate about people and providing exceptional experiences. The customer is at the heart of our business. You don't require hands on industry experience to be a TRIB3 store owner, our expert support team will guide you.

Key personnel

- Kevin Yates, CEO and co-founder
- Jonathan Fisher, Chairman



PRODUCTS & SERVICES

HCM

HANDBOOK
2021–2022

PRODUCTS & SERVICES

Company profiles p148

Product innovation p220

Active IQ

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Active IQ

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Active iQ



Jenny Patrickson

About us

The UK's leading Ofqual-recognised awarding organisation for the physical activity sector, Active IQ offers over 100 accredited qualifications in a variety of disciplines from Entry Level to Level 5. Within the apprenticeship sector, Active IQ offers over 15 End-Point Assessments across the leisure, education, facilities management and community sectors. Our experienced assessors and knowledgeable apprenticeship team support apprentices, employers and training delivery teams to achieve the best outcomes.

Product range and services

As well as offering qualifications across the physical activity sector, business & administration, customer service and functional skills, we offer a highly diverse portfolio of additional products and services including:

- Skills Hub – providing comprehensive support to approved centres, with access to interactive educational webinars, CPD and resources in a variety of subjects.
- Professional Career Development – to qualify as a tutor, assessor or internal verifier and gain understanding of external quality assurance.

- Professional Recognition – a 'kitemark' which encourages training centres to reach high standards
- End-point Assessment - we offer these services for over 15 apprenticeship standards with more in the pipeline. Active IQ also supports a range of learning development initiatives, awards and events from the Active Uprising, Community Sport & Recreation Alliance and Association of Colleges awards. We are a founding partner of the #DoingOurBit platform: a free fitness platform to support NHS staff during the pandemic.

Key customers

We work with over 500 approved centres, including private training providers, colleges, employers, leisure service providers, universities, colleges, schools,

nursery settings, prisons, young offender institutes and international centres.

Future plans

A range of refreshed qualifications will be launched. We have launched a partnership with the AOC to support students and colleges. We are also working on new EPA Standards.

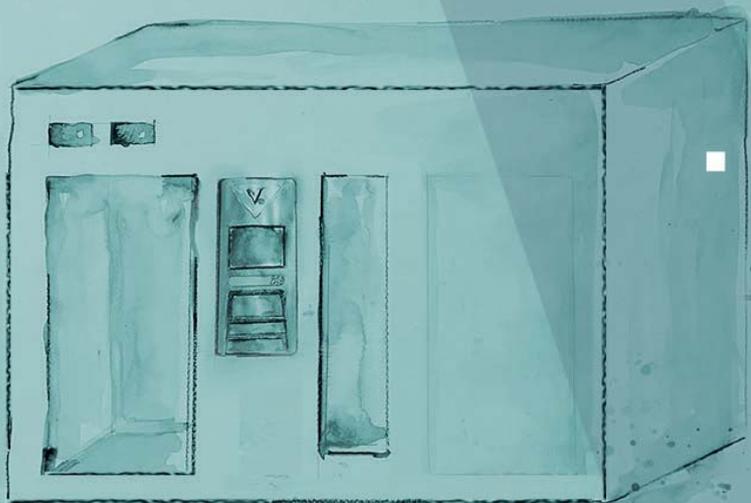
Key personnel

- Jenny Patrickson, Managing Director
- James McPherson, Commercial Director
- Tad Chapman, Head of End-Point Assessment
- Mandie Percival, Head of Quality Assurance
- Ali Gower, Head of Customer Experience and Operations
- Lee Buck, Head of Product Development

"As an Awarding Organisation, Active IQ is incredibly supportive. Particularly during the pandemic as we have had to adapt in so many ways. It's been difficult at times, but they make everything achievable. Skills Hub really sets Active IQ apart by offering this unmatched resource to bring us up to speed on new qualifications and standards, industry knowledge and essential updates."

James Luscombe, Managing Director, StudyActive

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cryo
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Art of Cryo

A division of L&R Kältetechnik GmbH & Co.KG

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Email: contact@artofcryo.com

Facebook: www.facebook.com/artofcryo

Instagram: www.instagram.com/artofcryo/

LinkedIn: www.linkedin.com/company/artofcryo

www.artofcryo.com



Rainer Bolsinger and Andreas Blum

About us

Art of Cryo is a new division of a renowned family business with 30 years' experience in ultra-low temperature equipment. A 26-year old legacy of building the best quality solutions for whole-body cryotherapy is the foundation to offer our high performance cryo chambers - The Art of Cryo Vaultz®.

Product range and services

We offer a wide range of treatment solutions for whole-body cryo.

single Vaultz® are space-saving solutions. The V1 is the superior, innovative entry-level model. V1 lux is the professional, corner version, with an automatic air drying system and is also available as V1 lux pro2 for two and V1 lux pro3 for three guests.

vario Vaultz® offers -110°C in a spacious treatment room, with one or two anterooms. The control unit, designed in carbon by Antonio Capristo, houses a 22" display. CCTV, intercom and sound module in the treatment room as standard. Extra large windows give perfect visual contact with guests.

unical Vaultz® are for the innovative, who like extravagance. They can be used



Vaultz® - The High-Performance Cryo-Chambers

to deliver special one-off projects for selected customers.

Art of Cryo products are made to the highest quality standards and are only powered by electricity. They're also extremely efficient and eco-friendly, delivering accurate temperatures. Our technical knowledge has been honed over 30 years and our equipment is designed and manufactured by parent company, L&R Kältetechnik.

All products are made in Germany and our exclusive partnership with the best

whole-body cryo treatment software provider, makes treatments even more secure and effective and offers individualised protocols. In addition, you get certification, ongoing online training updates and access to new research.

Key customers

We worked for many worldwide top class sports clubs, hotels, clinics and cryo centers for 25 years under another brand. Most recent references of the new Art of Cryo Vaultz® are Cool-Zoone (D), Repose-Space (UK), Medical Sport Stadium (FR), Soho House Rome (IT), Core Spa (KSA).

Future plans

To develop the division Art of Cryo with the brand Vaultz® from quality leader to be the absolute leader in WBC solutions.

Key personnel

- Rainer Bolsinger, CSO & CMO;
- Andreas Blum, Dir Sales Hotel & Spa APAC
- Jürgen Cyba, head of service;
- Marco Pantani, head of production and installations;
- Robin Melenhorst, head of connectivity



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Core Health & Fitness

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www.corehandf.com

CORE HEALTH & FITNESS



Michel Somford

About us

Founded in 2010, Core Health & Fitness is a vertically integrated company offering innovative solutions for all your facility needs, providing the highest quality equipment, backed by a support team which will always go the extra mile.

Our manufacturing facility in Xiamen, Fujian, China produces our high-end commercial fitness products. In addition to manufacturing our own products, Core Health & Fitness is the OEM provider for many top tier brands in the industry.

We offer 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.

Product range and services

At Core Health & Fitness we have 5 brands under our product portfolio:

- **StairMaster®** knows what it takes to make the toughest workouts, pioneering the stepmill and taking HIIT to the next level. We're a trend forward brand which will continue to lead the way in fitness training with innovative products and our unique style of encouragement that

dares you to challenge yourself and push through the pain.

- With historic roots in outdoor cycling, **Schwinn's®** focus has always been on authenticity and quality. We brought the feel of the road to indoor cycling with the same expertise and education which drives the industry forward. Schwinn is an informational and educational source for all things indoor cycling.

- **Nautilus®** invented the entire modern strength training category 50 years ago, and we have been reinventing it ever since. We never innovate for the sake of fads, but to provide a fitness experience which naturally fits human movements. We wouldn't settle for anything less.

- **Star Trac®** is with you and your members for every step. We go beyond providing cardio products by developing innovative user-oriented solutions which help to mould lifelong health and fitness habits.

- **Throwdown®** creates opportunities to push boundaries, enabling everyone to reach their peak performance by creating flexible and challenging exercise environments. Our diverse offerings make it easy for trainers and members to mix it up.

Key customers

Coach Gym Ltd, Life Leisure, TRIB3, UFC, Holmes Place, Fitness First, Crunch Fitness, Fitness 24 Seven, Fit20.

Future plans

In the current climate it is challenging to make short term decisions but we believe our industry will emerge strong from this Covid crisis. In 2021 we will continue to invest in our innovative product portfolio. We will be expanding our Throwdown offering and have launched 2 new Schwinn bikes – Z & X, designed with authenticity and inspiration in mind.

We are continuously adapting to support our customers to allow them to maximise new trends and opportunities. We are going into 2021 with newly structured market and channel strategies, which will enable us to strengthen valued relationships and enter into new ones.

Key personnel

- **Michel Somford**, Director of European Sales
- **Steve Jones**, Director of Distributor Sales Europe
- **Peter Rigg**, Director of UK Sales

Our family of hardware, software & services

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workouts

E G Y M

digital



EGYM UK Ltd

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E G Y M



Kerstin Obenauer

About us

EGYM is a leader in global fitness technology, providing a network of fitness facility partners with intelligent workout solutions, built on a robust ecosystem of connected gym equipment and software.

Through its smart gym equipment, third party integrations and digital solutions, EGYM empowers gym operators to deliver a workout experience which supports their members' lifelong fitness journey. Data-based guidance keeps members engaged and motivated.

Product range and services

EGYM makes exercising smarter, more efficient, more effective and more measurable via its suite of connected gym floor equipment and digital products.

This year, EGYM launched Fitness Hub, a fully-integrated solution which combines advanced 3D-imaging technology with

machine learning-optimized software to enable efficient and touchless new member onboarding. It provides precise, self-service assessments, helping everyday health-seekers visualise results.

Fitness Hub is the centre-piece of the connected training experience, seamlessly connecting to EGYM's Smart Strength Series and Smart Flex, automating programming and progression, equipment set up and regular performance feedback.

Fitness Hub fully integrates with a range of third party data providers including body analysers, cardio equipment and fitness trackers. Data is pooled, interpreted and stored in the EGYM Cloud and fed back to the member through a single lens, in easy to understand formats. Information is available via the EGYM member app.

Through its unique BioAge function, EGYM feeds real time performance

data to members, based on a number of scientific health indicators, helping members measure the link between training and health improvements.

Key customers

We work across a number of industries, including fitness, health and education.

Future plans

To continue to grow our global network of facility partners and expand the accessibility of our products and services.

We will continue to listen and respond to the needs of the market, helping operators create engaging and effective training environments for everyone.

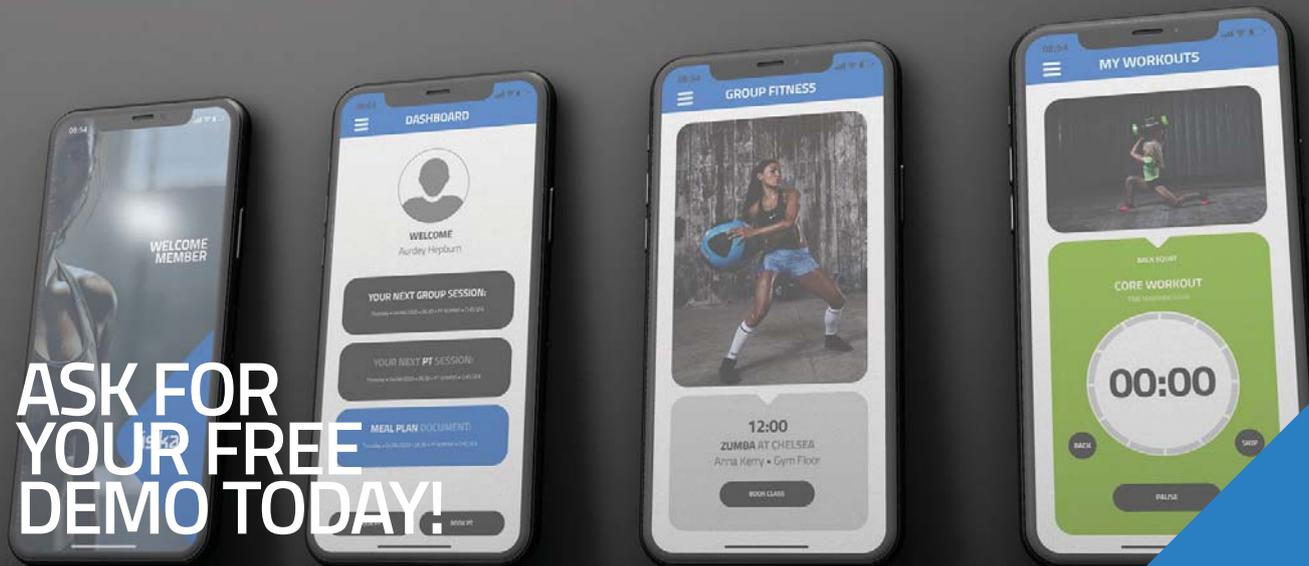
Key personnel

- Kerstin Obenauer, Country Director, UK
- Tanya Hall, Marketing Manager, UK
- Craig Worley, Key Account Manager, UK
- Stefan Rauch, Consumer Success Manager, UK
- Mark Mansfield, Concept Consultant, UK and Wales
- Michael Klonecz, Implementation Manager, UK

"I find this functionality absolutely invaluable in my rehabilitation work. It also motivates clients because they are provided with regular, evidence that their effort is translating into the achievement of specified goals."

Matt McArdle Msc. Physiotherapist, Personal Trainer, Founder of Nu Physio and Fitness

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Rob Lander

About us

Fisikal is a business management software that takes care of all aspects of business and gives access to the tools you need to future proof your business in an ever-changing landscape.

Fisikal specialises in delivering innovation rich digital solutions to multi-site operators, product manufacturers and education organisation through its flexible custom branded web and app-based platforms.

To complement a huge range of functionality that can be switched on and off as required, Fisikal integrates seamlessly with third party providers from CRM and accounting systems to fitness trackers and payment providers, creating a digital ecosystem of functionality, accessible anytime, anywhere..

Product range and services

- Realtime Bookings & Payments



- Live-Streaming & On-Demand
- Assessments & Programming
- Staff Management & Education
- Reporting & Business Analysis
- Integrations & Custom Development

Key customers

Third Space, Frame, DiR, GetSetGo, Matrix Fitness, Escape Fitness, Fitpro, Drummond Education, Impact Training, Surge & Bodytec.

Future plans

To continue to evolve key functionality in line with market needs, creating the optimal business management solution for a broad range of fitness organisations from single to multisite. Delivering a frictionless customer-centric experience whilst optimising business efficiencies will remain at the heart of our offer, integrating the latest innovations and developments such as AI and machine learning.

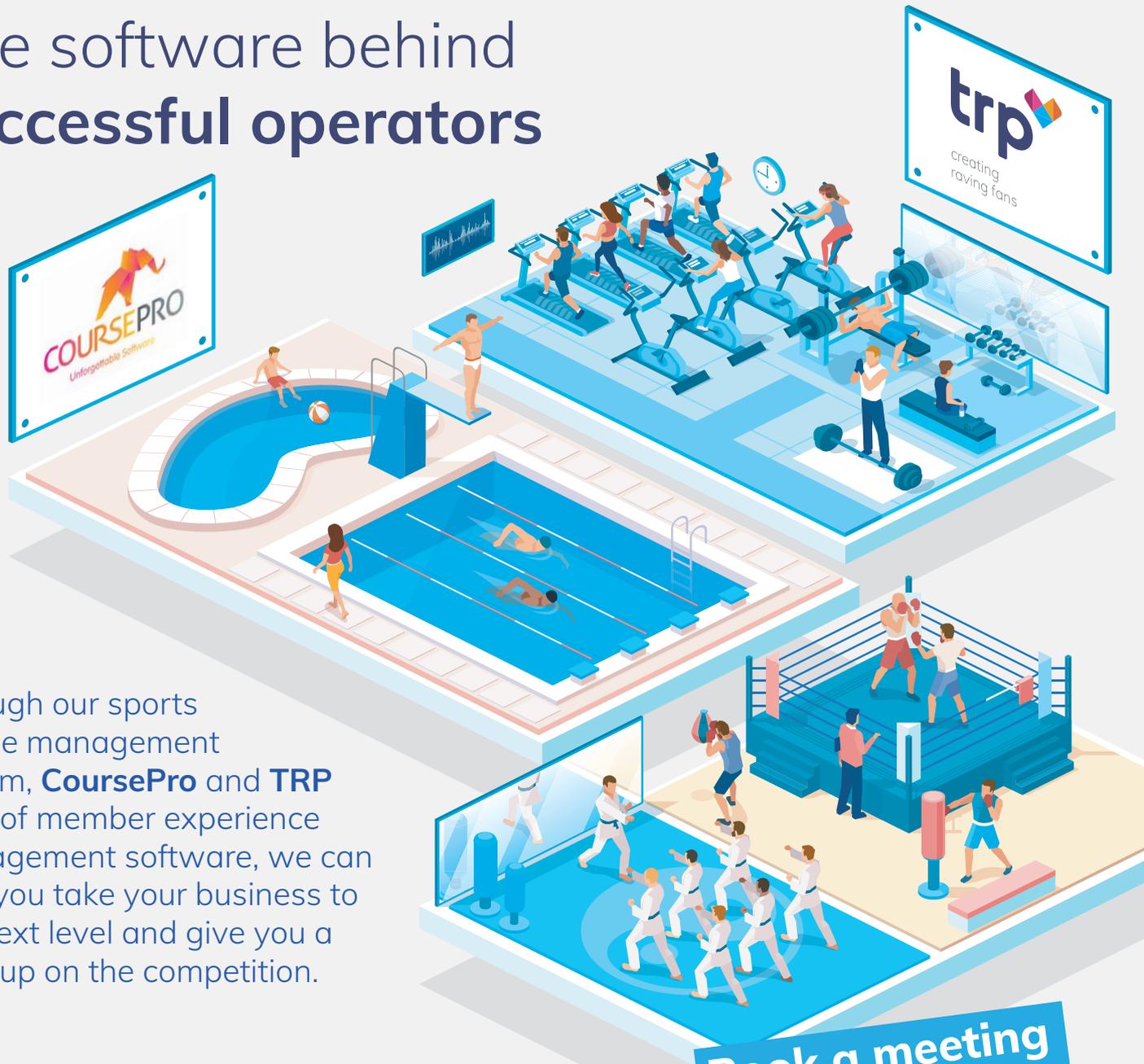
Key personnel

- Rob Lander, CEO
- Emma Excell, COO

“Fisikal has helped to future-proof our business. The team have a fantastic, can-do attitude and worked with us on bespoke development. We like to innovate and working with Fisikal has given us much more scope for additional functionality in the future”

Pip Black, Founder, FRAME

The software behind successful operators



Through our sports course management system, **CoursePro** and **TRP** suite of member experience management software, we can help you take your business to the next level and give you a step-up on the competition.

Fitronics

Get in touch:

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www.trpcem.com

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www.coursepro.co.uk

Fitronics (CoursePro and TRP)

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www.fitronics.com



Daniel Haywood

Fitronics

About us

Fitronics is the company behind The Retention People (TRP) and CoursePro. CoursePro is a comprehensive, end-to-end sports course management system. TRP's software is designed to help health and fitness operators improve retention by improving their member experience.

Product range and services

CoursePro's goals are to save you time spent on course admin and improve your customer experience. Key features include TeacherPortal, which allows those running your sessions to mark registers and do pupil assessments in-class, and HomePortal, which allows parents to track their child's progress and pay their fees.

TRP Insight is a Net Promoter Score® based member feedback tool built specifically for health and fitness clubs. The user-friendly system allows you to tap

into invaluable member feedback at-scale and easily identify trends in responses to make informed business decisions.

TRP Digital enables operators to build rule-based, automated email and SMS journeys, using member information such as membership type, age group, and gender, to keep members engaged with tailored content when they are away from your facility. Using our exclusive risk-of-dropout algorithm, you can even set up Digital to automatically reach out to members when they become 'high-risk'.

TRP Interact is where it all began for Fitronics, back in 2002! Our research showed then, and continues to show now, that members who are spoken to when they visit have better retention rates. Interact gives a systematic way of managing your staff's gym-floor interactions with members and measuring their effectiveness in terms of retention.

Interact's 'Signpost' functionality allows you to target specific member groups for conversation based on their risk-of-dropout, membership type, join date etc.

Key customers

We work with over 300 companies globally representing 1,200 facilities across the sector.

Future plans

Over the coming 12 months we will continue to enhance and improve our offering. This will include a revamp of TRP's Digital and Interact software, as well as significant enhancements to CoursePro's HomePortal and online joining modules. We will also investigate new integrations with online fitness platforms and expand our work with governing bodies to support youth athlete development.

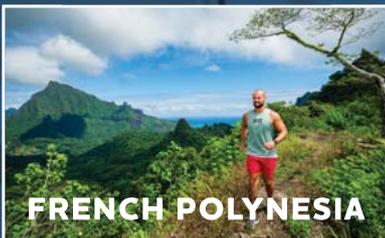
Key personnel

- Daniel Haywood, Managing Director
- Marc Jones, Head of Commercial
- Eddy Graham, Sales Account Manager
- Rob Howes, Sales Account Manager
- Tom Doodson, Sales Account Manager
- Ana Marin, Sales Account Manager

"Your willingness to work with us through the pandemic meant and continues to mean a lot to us. The product continues to provide us with valuable input and actionable knowledge. It's essential."

Ken Brown, Owner, Fitness Incentive

WHAT IS TODAY'S WORKOUT DESTINATION?



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THE CARDIO EXPERIENCE REIMAGINED

Powered by iFIT, the 22 SERIES cardio keeps users engaged with vivid imagery, motivational coaching, and auto-adjusting technology that delivers an immersive and interactive cardio experience.

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FREEMOTION



Tony Ali

About us

Owned by ICON Health and Fitness, Freemotion is a global pioneer in fitness equipment and technology, including cable-based strength training, the Incline Trainer, and the first road-simulating indoor bike. Freemotion is now leading the way in interactive, connected fitness with the 22 SERIES cardio line powered by iFit, while reinventing small group training with FUSION Team Training. With science and innovation at its core, Freemotion questions how we work out and then redefines it, creating groundbreaking products which deliver an unbeatable user experience which ultimately drive commercial results for its partners.

Product range and services

Freemotion creates immersive, results-driven experiences which reimagine cardio, strength, and small group training.

Re-Imagined Cardio Experiences:

From the entry-level model to the ultra-advanced and high-performing 22 SERIES, powered by iFit, the Freemotion cardio range has been designed to deliver immersive, engaging, and interactive experiences. Combining unrivalled engineering, technology, and content, Freemotion cardio provides operators with a fully holistic, digital solution capable of facilitating a high-impact, omnichannel fitness experience.

Game-Changing Small Group Training:

FUSION Team Training is the ultimate blend of cardio and strength training in a high-energy, coach-led, Covid-safe, small group class.

Multi-Dimensional Strength Training:

Encompassing the philosophy, principles, and programming of functional fitness, Freemotion strength has been developed to enhance an individual's ability to

perform daily activities, sport, and recreation. Allowing users to train their bodies freely without restrictions, based on their motion ranges and physical abilities, it makes strength training accessible, inclusive, and progressive.

Key customers

Orangetheory Fitness, 24 Hour Fitness, Genesis Health Clubs, Gold's Gym, BLAST, 3Tribes, Chuze Fitness, SWEAT 1000, World Gym, and many more.

Future plans

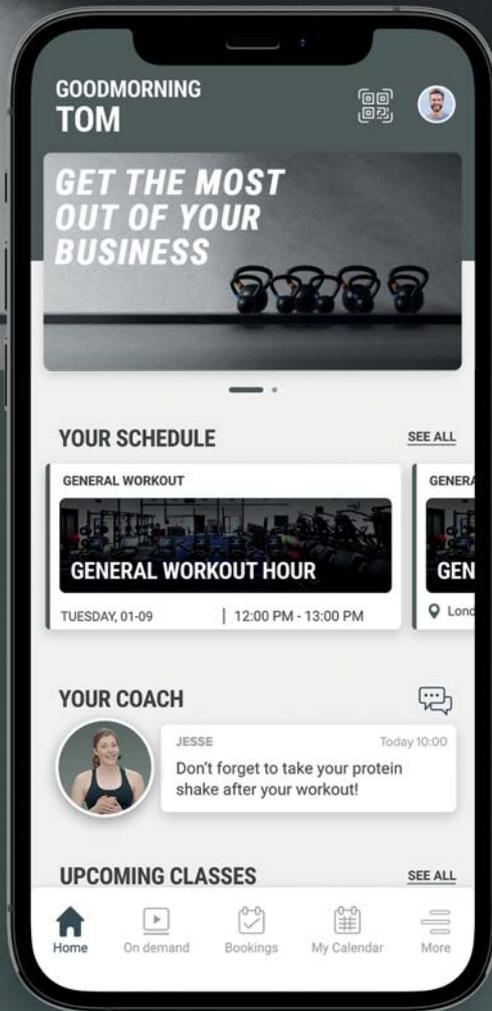
Freemotion remains focused on its mission to provide operators and members with best-in-class products and experiences to drive engagement, retention and revenue.

Key personnel

- Tony Ali, Country Manager UK
- Dan Toigo, Senior Vice President and Managing Director
- Chris McGill, Vice President of Global Sales
- Apostolos Seintis, Sales Director, Europe
- Peggy Vo, Global Marketing Director

"There is no other treadmill like the Freemotion REFLEX™. The extreme flexibility of the REFLEX Cushioning is a significant part of the Orangetheory experience and gives our members a workout that we believe can help change their lives."

Dave Long, Chief Executive Officer, Orangetheory Fitness



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www.funxtion.com



Ernst de Neef

About us

As one of the first to digitise the full fitness experience, we challenge the traditional way of offering service to members.

FunXtion ensures gyms stay relevant with energising fitness content and smart delivery. We extend the gym's influence outside the four physical walls and deliver 360° relevant content when and where the customer needs it. With our smart in-gym digital delivery systems we break out of the traditional and create experiences that exceed customer expectations.

Product range and services

FunXtion delivers high-quality content in the form of classes, interactive and digital fitness workouts, and new exercises, training routines and virtual classes monthly. All of this can be delivered to your members through engaging in club

experience solutions and app, either custom branded or FunXtion branded. The FunXtion Portal allows you to create training plans, create and schedule workouts, video calling and chat giving you complete connection with your member, keeping them motivated and engaged - efficiently and effectively for your team.

Key customers

FunXtion is proud to support all our clients across 24 countries including: Anytime Fitness International, GoodLife Fitness (Canada), PureGym (UK), SportCity and Fit For Free (Netherlands), Sporteve (Germany), FLG Group Australia and SC Fitness (Portugal).

Future plans

Off the back of a successful launch of the Virtual Class Player for in-the club



experiences, branded app classes for members at home and on-the-go and most recently a corporate wellbeing app, we are now looking to expand internationally and explore new market segments.

Key personnel

- Ernst de Neef, CEO Founder
- Mendel Witzzenhausen, CTIO, Founder
- Tom de Lange, Head of Product
- Joyce Power, Head of Marketing
- Karen Euser, Head of Content
- Dylan Watzeels, Head of Club Digitalisation
- Anthony Agustin, Head of Development

"A great choice of digital partner based on the quality of provision, ease of integration, and shared vision on future innovation. I am confident that working together will enable us to continue to deliver an industry-leading product that enhances the experience of all our members."

Lucian Weston, PureGym

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www.hutchison-t.com



Mark Hutchison

About us

Hutchison Technologies helps the UK's leading gyms, health clubs and leisure trusts create memorable experiences their customers can't get at home.

We do this by combining leading technology brands with our in-house product development expertise, and blending decades of experience as health and fitness technology integrators with support from our network of design consultants.

Our team brings the right technologies and people together to transform your spaces into experiences.

Product range and services

We deliver end-to-end immersive experience solutions and custom integrations using our expertise in audio visual, feature and effect lighting, access control, networking, and connectivity.

Our most iconic installations are custom immersive studios that create truly memorable audio visual experiences, but our solutions extend across the whole venue.

We also supply secure access control systems that improve member flow, speakers and lighting suitable for all

areas of your building, telecoms and connectivity solutions that streamline communication and internet access, and software that creates an effortless experience by automating activity and integrating with your other systems.

USPs

- Industry-leading custom AV and lighting solutions
- Preferred technological partner for Technogym and Les Mills.
- In-house R&D team for custom automations and integrations with 3rd party systems
- UK partner and distributor for prestigious tech brands like Bose and Shure
- High stock levels for short lead times and expert ongoing support

Key customers

David Lloyd Clubs, Gymbox, Nuffield Health, The Gym Group, Village Hotels, GLL, Places Leisure, and many other leisure trusts, local authorities, universities, independent facilities, and boutique studios.

Future plans

Over the next year we'll be adding several new digital elements to enhance member experiences, including a HIIT training app, digital member cards, and a series of cinema-quality virtual wellbeing classes called the Earth + Sky Collection.

Key personnel

- Bruce Hutchison, Managing Director
- Mark Hutchison, Technical Director
- Jonny Curley, Director of Sales

"Our partnership with Hutchison Technologies means we can offer the latest and greatest AV solutions. Their support has been excellent, right from initial concept through to final delivery, and the finished product really has that wow factor. We recommend them to anyone looking to take on a similar project."

Martin Anderson | Capital Projects Director, Places Leisure



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We've been designing and delivering high quality training spaces for 25 years, offering expert advice on everything from flooring types to equipment mix, to the best utilisation of space.

Our in-house design team and manufacturing plant gives us the flexibility to create and deliver tailored strength and functional training solutions.



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Gary Oleinik

About us

We Create Training Spaces: We've been designing and delivering high quality training spaces for almost 25 years, offering expert advice on everything from flooring types, to equipment mix, to the best utilisation of space. Bespoke product designs, incorporating client logos and colour schemes, are all part of the service.

We are a UK manufacturer: We are very proud of our UK manufacturing heritage. Our in-house design team and manufacturing plant gives us the flexibility to create and deliver tailored strength and functional training solutions.

We are flooring experts: We understand there's no 'one size fits all' approach when it comes to flooring - different training methods require different flooring types. With Indigo Fitness, you'll benefit from all our experience and technical know-how, gained from years of creating and installing fitness flooring solutions.

Product range and services

From racks and rigs, to strength stations, and flooring – we've got everything covered for a full facility fit out. We design and manufacture our equipment at our headquarters in Warwickshire.

Custom strength and functional training solutions, designed to meet client specifications, are at the heart of our offering.

We're also exclusive UK distributors of:

- DuraTRAIN and DuraSOUND flooring tiles
- PaviFLEX turf and flooring tiles
- RAZE strength & conditioning equipment
- Carbon Claw combat gear
- Kenguru Pro - street workout, calisthenics and parkour equipment

Future plans

Over the next 12 months we'll be continuing to develop our outdoor training solutions and look forward to bringing them to the wider fitness market. Designed and manufactured in Britain, our outdoor training solutions have already benefitted



a wide range of users such as the military, schools, and sports clubs, but we think there's plenty of scope for these products in the health clubs and fitness market.

Key customers

Alliance Leisure, PureGym, Soho House, Ministry of Defence (MoD)

Key personnel

- Jamie Taylor, Director
- Gary Oleinik, Sales Director

"From start to finish IndigoFitness were professional and knowledgeable, not only about their own product but also about the design of the gym and the overall process. Their attitude was excellent, and the quality of the work exceeded all expectations."

Harry Harkins, Director of Estates at Marlborough College Malaysia

JORDAN

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JORDAN



Zak Pitt

About us

Jordan Fitness is a recognised leader in functional fitness, specialising in premium quality yet value for money. For more than 30 years, we have been at the forefront of product design, featuring several registered designs including our Fusion HIIT Bench and Ignite range of Dumbbells, Pump X Studio Barbells, Olympic Discs, and Functional Rigs.

We are continually creating unique free-weights and gym accessories including slam balls, sandbags and plyometric boxes, in addition to gym benches and racks.

Product range and services

From free weights and flooring, to functional fitness accessories, benches, rigs, studio equipment, and combat equipment, everything is designed and crafted to the highest standard.

If supporting UK manufacturing is important to your brand, we are extremely proud of our Made in Britain

gym equipment range, featuring our Fusion HIIT Bench, a range of gym rigs, benches, and machines, including our Dual Pulley.

For a more personalised, bespoke look and feel, you can also customise your kit. 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 premium sprint track turf.

We offer a 3D gym design service and support marketing activity prior to your gym opening. As an education supplier, we also offer a range of fitness instructor courses in Olympic Weightlifting, Indoor Cycling, MMA, and Kettlebell, all available in-house at your convenience.

Key customers

National and international clients in all corners of the fitness sector, including



PureGym, energie Fitness, Anytime Fitness and Parkwood.

Future plans

We're excited to launch a new range of space-efficient, free weight racks and will be working with a range of partners, including Therabody, to better support commercial gyms and leisure centres in growing their member base.

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

For over four decades, Keiser has influenced the training of athletes, fitness enthusiasts and rehabilitation experts worldwide with unique cardio, and strength products which enable the user to train at any speed.

Product range and services

Pneumatic Resistance System – With Keiser pneumatic technology, the muscles remain active and engaged throughout the entire range of motion, irrespective of velocity with reduced shock loading to muscles, connective tissues and joints, which allows for workout regimens that can safely improve physical performance. Train strength, hypertrophy, speed, power and muscle endurance on one machine.

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

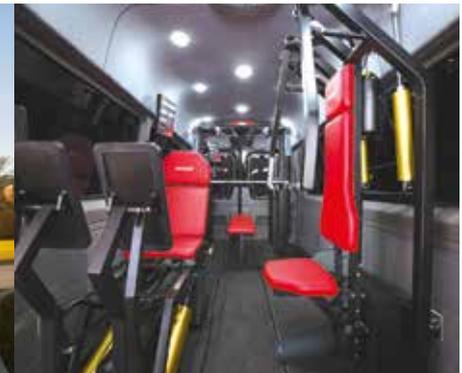
2021 will see the launch of our Mobile Show Room. You will now be able to test our equipment where and when it is convenient for you.

Shows attending

IHRSA, FIBO, SIBEC Europe, Elevate and Leaders in Performance.

Key personnel

- Robin Gand,
Vice President: UK,
Europe & Africa
- Garry Spreadborough,
UK Sales Director



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Screen Virtual LES MILLS classes in-club.

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Stream your Instructors teaching LES MILLS classes (options to build your own digital library)

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LES MILLS



Martin Franklin

About us

For more than 50 years Les Mills has been leading the way in fitness. We produce 22 group fitness programmes, backed by science, to be experienced in club or at home via Les Mills On Demand. In 2020 we had 1.1 million digital fitness users. Every week, millions of people get fit in 21,000 clubs, across 100 countries with the help of 140,000 Les Mills instructors, who bring to life programmes such as BODYPUMP™ (the world's most popular barbell workout), BODYCOMBAT™ (martial arts), RPM™ (indoor cycling) and BODYBALANCE™ (new yoga). A study with ukactive revealed attending Les Mills classes extends club memberships by an average of nine months.

Product range and services

As we enter a new age of fitness, Les Mills is committed to helping our club partners

grow healthier businesses by meeting the consumer demand for blended between online and offline fitness services.

We've now taken our live products digital, providing the tools for clubs to livestream or build their own video on-demand content library with LES MILLS CONTENT. Virtual and immersive Les Mills studios in-club provide high quality digital experiences with the added benefits of member retention and authentic, human connection.

We offer comprehensive instructor training, with seminars, group discussions, practical workout sessions and teaching practice, assessed by international trainers and presenters, followed up with ongoing development.

For our partners, we also offer CIMSPA-accredited Group Fitness Management training at no additional cost – with proven strategies to maximise

attendance and delivering the best member experience.

By providing world-class experiences through group workouts and engaging with members inside and outside of their facility, we've helped to support thousands of clubs take the leap into digital fitness alongside a live offering. With round-the-clock access to more than 1000 workouts, LMOD grew by 800 per cent in nine months last year.

Future plans

As the UK moves into key recovery stages, Les Mills will be focused on supporting all club partners to make their fastest way back to full membership with confidence, bringing live group fitness back onto the menu. There's a huge opportunity to engage with new members: 63 per cent of LMOD users are interested in trying a live class.

We are continuing to invest in our instructors with our commitment to training and ongoing development. This includes offering instructors a multitude of platforms to learn from.

Key personnel

■ Martin Franklin, Les Mills CEO, Europe

“Member feedback (on Les Mills On Demand) has been phenomenal both from regular group exercisers, but also from those that have never done it before, giving them the confidence to come and try a live class when we re-open.”

Peter Wilkinson, National Sales and Marketing Manager, Bannatyne Group



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STRENGTH**

**INDOOR CYCLING
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Craig Cocking

About us

For 50 years, Life Fitness has worked in collaboration with customers to deliver tailored solutions and experiences for them and their members.

Our mission is to inspire healthier lives, and our strong heritage and family of brands illustrates our commitment to delivering the best products as global industry leaders. We are driven to inspire business success, lifestyle changes, and personal transformations, and with five decades of learning and growth behind us, we know that innovation is essential to not only excel, but to drive disruption.

Product range

The Life Fitness family of brands offers an unrivalled product portfolio, providing customers with access to tailored solutions they need to target every segment of the fitness market. Life Fitness offers cutting-

edge cardio equipment, groundbreaking group training systems and premium strength training with across our range of brands: Life Fitness, Hammer Strength, Indoor Cycling Group (ICG) and Cybex.

Our goal is to connect people emotionally to their fitness journey - feel inspired when running on a Life Fitness treadmill, motivated when using Hammer Strength equipment and energised when on a Cybex Arc Trainer.

By combining highly durable, biomechanically designed equipment with innovative digital technology and education, we are able to continuously improve the customer experience so that the people and businesses we interact with are able to thrive.

Future plans

We will continue to put our customers at the forefront, evolving and adapting support in-line with their needs as the

industry recovers from the pandemic.

Our extensive product road map will see exciting new innovations launched, supported by digital content and education to deliver new member experiences.

Working in partnership to drive success is in our blood, and will continue to be an important part of our strategy, extending relationships with key partners including Williams Racing and the LTA, to drive best practice and strengthen our position within our target sectors.

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.

Key personnel

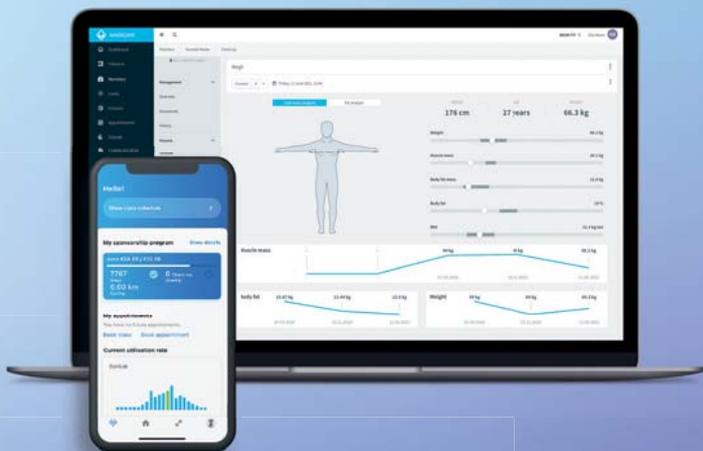
- Craig Cocking, UK Country Manager
- Chris Webb, UK Strategic Partnership Manager
- Tom Lakeman, UK Sales Manager

“We’ve been thoroughly impressed by Life Fitness since awarding the contract last year; they’re a great brand fit, and the quality and range of equipment, alongside their unrivalled support, will ensure we can deliver high quality fitness facilities catered for our wide-ranging member demographic.”

Glen Hall, Managing Director, Parkwood Leisure

DIGITALIZE YOUR GYM

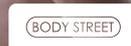
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MAGICLINE
A Sport Alliance Company



Maike Kumstel

About us

For more than 30 years, Magicline has been driving the digitalisation of the fitness industry with innovative, state-of-the-art software solutions. This is acknowledged by being the most awarded software in the fitness industry. The highly integrated management software perfectly matches all individual needs by building efficient and sustainable structures.

Our experience and the continuous development of our software positioned us as the leader in software development throughout Germany. More than 4,200 studios – including some of the biggest fitness chains and franchise systems as well as small independent studios – put their trust in our solutions.

Product range and services

Sport Alliance GmbH specialises in innovative solutions around gym management, financial services and a centralised supply chain management solution for gyms, franchises and chains. The group of companies counts over 4,200 clients, including McFIT (RSG Group), clever fit and Bodystreet.

With Magicline, Sport Alliance offers Europe's leading cloud-based management software for the fitness industry and supports gym operators with optimising and digitalising their facilities.

Alongside Magicline, the company's portfolio also includes the fitness website and training app MySports; bedarf.de which specialises in the purchase of goods for fitness studios, as well as Eurofit24 and Pay Due, two brands focusing on factoring and receivables management in the fitness industry.

Key customers

RSG Group (McFIT, Gold's Gym, John Reed, High5); clever fit; Bodystreet; easyfitness

Future plans

Magicline will actively drive the internationalisation process forward on

a global scale. "As a successful software provider on the European market, we would now like to help gym operators worldwide with the digitalization of their fitness and sports facilities," says Maike Kumstel, responsible for International Business Development at Magicline. The continuing development of the software according to the specific needs of our customers will remain a focus as well. To provide the best customer interface and most innovative user experience is of high importance within this process.

Key personnel

- Daniel Hanelt, CEO Sport Alliance GmbH
- Konstantin Wolkowa, Head of Magicline
- Maike Kumstel, International Business Development Magicline

"We relied on Magicline for the biggest IT transformation McFIT has ever done. Why? Because it simply fits – on a personal, professional and technological level. We re-evaluated the importance of software to our company's success and found the perfect partner who sees the world the way we do."

Vito Scavo, Chief Operating Officer, RSG Group GmbH

GET MORE

**Supporting you along your journey,
every step of the way...**

As a Total Solutions Partner, we believe that providing industry leading fitness equipment to our customers shouldn't be the end of the journey... it's just the beginning.

At Matrix, we can provide your facility with a bespoke package of marketing, training, service and even construction solutions to suit your needs.

For more information,
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Matrix Fitness

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Facebook: www.facebook.com/MatrixFitnessUK

Company blog: www.matrixfitnessblog.co.uk

<http://uk.matrixfitness.com>

MATRIX
FITNESS



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.

Product range and services

Matrix Fitness strives to offer equipment that will captivate your members, is easy to maintain and delivers the best return on investment.



This year, Matrix Fitness have launched an all-new, three-tiered cardio offering, compatible with five reimagined consoles for combinations of performance and technology that can accommodate virtually any fitness facilities budget, space and members.

New to the strength portfolio, Matrix Fitness have also unveiled the new Go Series Strength units which are ideal for facilities looking to appeal to members new to strength training and circuit programs. The series comprises ten single station machines, each designed with low starting weights, compact footprints and back-to-back configurations that will improve traffic flow and help serve more members when space is at a premium.

Key customers

PureGym, The Gym Group, ROKO, SNAP, InspireAll, IHG, Accor, Marriott, Abbeycroft Leisure, Halo Leisure, East Riding of Yorkshire Council, University of Durham, University of Bath.

Future plans

2021 will see Johnson Health Tech expand digital and connected solutions for all markets including consumer, driven by our own product development and manufacturing plants.

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

Body Composition Analyzer

Application Area

Senior Care Center
Yoga
Hospital
Health Club
Nutrition/Dietitian
Slimming Center

Key Features

Blind Mode
Ergonomic Design for Comfortable Measuring Posture
Easy Operation via Touch Screen
Simple Interface
Convenient Patient Data Management
Age-specific Analysis
Compact Foldable Design



Blind Mode

Muscle & Fat Analysis

MEDIANA Score

Body Type Table

Body Type Graph

History



Distributor Wanted



www.mediana.co.kr jason.kim@mediana.co.kr

Mediana Co. Ltd

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Dr. MJ Khil

About us

Mediana specialises in the manufacture of medical and health care devices which we export as ODM and also as our own branded products all over the world.

We are working to become a true global market leader in the medical device and health care industry by developing new products such as body composition analysers, monitor/defibrillators, AEDs and patient monitors that form a major product line today.

We aim to reach these heights by generating the highest levels of synergy through the diversification of its products and overseas markets.

Product range and services

We are entering the high growth market for body composition analysers for obesity management clinics, sport/fitness centres and nutrition areas.

Mediana i-series can provide an accurate analysis of body composition through multi-frequency measurement. The measurement is made through bioelectrical impedance analysis, assessing the electrical resistance of cell membranes. Our device has a tetra-polar 8 point tactile electrodes system



that gives an accurate measurement of segmental body fat and muscle mass.

i-series uses the optimal algorithm developed by utilizing various body composition measurement methods such as DEXA, CT, and isotope dilution. It has a very high correlation coefficient with DEXA equipment, which is considered the Gold Standard in the body composition analysis method. Also, the reliability of the algorithm has been proven through clinical trials conducted by specialized institutions for a wide range of ages from 5 to 78 years old.

Furthermore, I-series can provide the blind mode. Users can hide fat and weight from the display by simply pressing a "Blind" button on the keypad. It can be turned on/off instantly during measurement and will be written on the result paper all the time.

Key customers

We work with a range of sports and leisure providers, senior care centers, yoga clubs, health clubs, Nutritionists and dietitians and slimming centres

Future plans

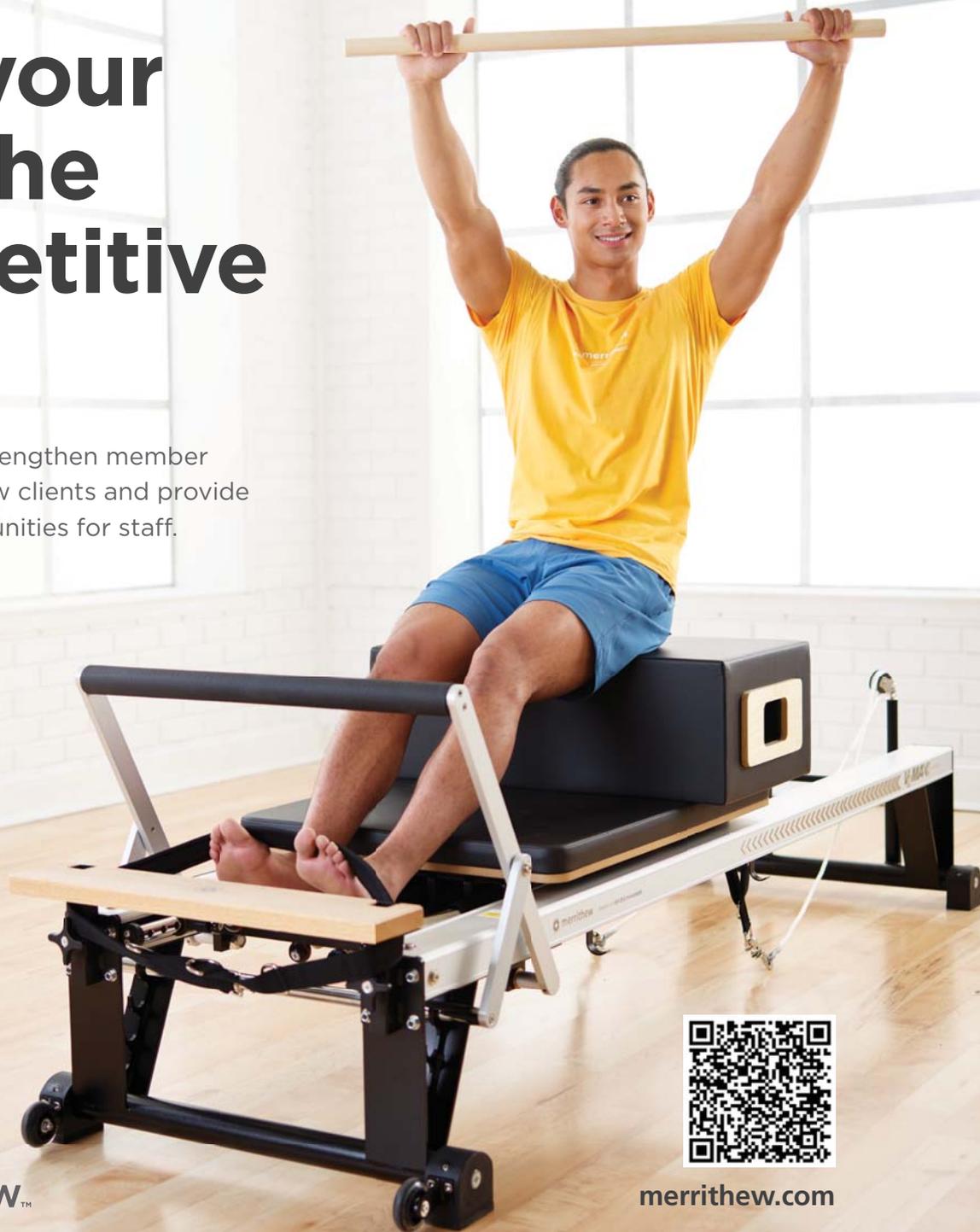
We are developing a high-end body composition analyzer which is i50. Our new device can provide ICW, ECW, whole body phase angle, visceral fat, subcutaneous fat, and nutrition guide. i50 can predict cellular health and integrity, so it can be used even in welfare facilities for senior citizens. Our i50 can provide more and detailed information, so customers can use the various areas to analyze physical and health information.

Key personnel

- Dr. MJ Khil, CEO(Chairman)
- Jason Kang, President

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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www.merrithew.com



Lindsay G. Merrithew
& Moira Merrithew

About us

Merrithew™ is the global leader in mind-body education and equipment. Founded in 1988, the company has trained more than 60,000 instructors worldwide, developed six innovative education programs— STOTT PILATES®, ZEN•GA®, Total Barre®, Halo® Training, Merrithew Fascial Movement and CORE™ Athletic Conditioning and Performance Training™— and has produced an extensive line of professional and at-home equipment and accessories for personal and professional use. In 2020, Merrithew launched Merrithew Connect™, a video streaming platform featuring the latest Pilates and mind-body training for fitness professionals.

Product range and services

Recognized 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 customizable 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, kids' fitness props, yoga and strength training accessories, massage, agility and rehab tools.

Additional services

Merrithew offers in-person and online training options, including certification programs, continuing education credits and professional development workshops. Merrithew education is available locally at more than 175 Training Centers around the world and at the Toronto Corporate Training Center.

Our thorough and comprehensive education provides instructors with the practical skills and knowledge needed to immediately incorporate Merrithew programming into any fitness setting, including group fitness, yoga, rehab and personal training. We equip our instructors with the education, tools and support they need to reach their potential and find fulfilling and rewarding careers in fitness.

Key customers

Merrithew caters to and provides services to a range of markets and clients, including boutique studios, fitness clubs, sports teams, rehab and health



care clinics, schools and universities, the hospitality sector, condos and residential developers, and retirement communities.

Shows attending

IHRSA (California), FIBO (Germany), canfitpro world fitness expo (Toronto), IDEA World Convention (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 THE SMART CHOICE



**FIND OUT
MORE!**

FOR INNOVATIVE CLUB OWNERS & PTs

- A scientifically proven, trainer led, 20-minute full body workout to deliver HIT adaptations in half the time
- Train more clients during each day and appeal to new user groups
- Increase PT penetration beyond gym floor members
- Deliver concierge EMS-Personal Training to your members at home.
- Differentiate your offer and give yourself a competitive advantage.



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www.miha-bodytec.com/en/



Phil Horton, Country Director UK & ROI

About us

miha bodytec was established in 2007 in Gersthofen, Germany and is the market-leading supplier of Electro Muscle Stimulation (EMS) equipment. miha bodytec manufactures all of its EMS training devices and products in Germany and its i-Body device is used all over the world. miha bodytec stands for reliable, innovative, safe and effective EMS training products.

The EMS training market is developing at pace in the UK, with miha bodytec's system suitable for numerous industry segments, from Personal Trainers looking to diversify their offer to pure EMS studios and shop-in-shop EMS, integrated into existing clubs. For operators, EMS is an exciting opportunity to drive secondary spend and additional member revenue as EMS Personal Training appeals to people beyond the gym floor. For PTs it offers a

way to diversify, innovate and increase revenue while improving work life balance.

Product range and services

Scientifically backed and proven in numerous scientific studies to help exercisers reliably achieve goals, 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.

It reduces bodyfat, improves muscular definition, strength, cardiovascular efficiency and rehabilitation, as well as offering a time-efficient (just 20 minutes), Covid-secure session. It is a highly effective and safe whole-body training method, suitable for everyone.

EMS is an exciting opportunity for clubs and PTs to diversify and boost revenue. With more than 2,700 EMS facilities and

250,000 people using miha bodytec every week in Germany, EMS is sweeping the market in Europe and the UK.

Key customers

Personal Trainers, EMS Studios, Health Clubs and gyms, medical practices, Sports Clinicians and Athletes.

Where in the world?

We distribute to 54 countries with direct subsidiaries in the UK and USA.

Future plans

miha bodytec's focus for the coming 12 months centres around raising awareness of EMS as an, innovative and effective form of training, and as a business opportunity for forward-thinking Personal Trainers and Wellbeing Professionals.

Key personnel

- Phil Horton, Country Director UK & ROI
- Andrew Cattell, EMS Business Development UK (North) & ROI
- Mike Boon, EMS Business Development UK (London)
- Charlotte Roberts, EMS Business Development UK (South)

The first time I tried EMS I loved it. I knew I couldn't keep doing six hours of PT a day forever – using EMS would give my body a breather. Plus, I wanted more time to spend with my young children without reducing weekly revenue. Offering EMS means I can charge a higher price for sessions which last half the time.

Sarah Biker, personal trainer

A man and a woman are looking at a tablet together in what appears to be a fitness studio. The man is smiling and pointing at the screen, while the woman looks on attentively. The background is a blurred view of a studio with rows of orange chairs.

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www.mindbodyonline.com/business



Josh McCarter,

About us

Mindbody is the leading technology platform for the wellness industry, featuring an app which allows users to book fitness, beauty and integrative health services, and industry-leading software for business growth and management.

Mindbody's software streamlines all aspects of business management for thousands of health and wellness businesses across six continents. The result is software with a positive impact on the health and wellness of the world.

Product range and services

Mindbody is an all-in-one fitness software which provides first-rate service for your clients and the most effective business management for your studio, offering a full set of tools to handle your operations, including scheduling, staff management and reporting.

Mindbody's Marketing Suite will help you to acquire new customers, increase visit frequency, get actionable feedback, win back lost clients, and generate word-of-mouth marketing. And save time doing it, so you can focus on your business.

Accept payments anywhere, and stabilise your cash flow and grow your customer base with monthly memberships. Take payments ahead of time, safely and securely, with stored credit card details. And accept in-person payments with our POS hardware, for a completely integrated payments solution.

Give your clients the power to book through the Mindbody app, your custom branded app, or your website. It's painless for clients and allows more time for your team to focus on customer experience.

Wherever they are, keep your clients engaged with your fitness classes using live streaming and video on demand

features integrated directly in your software. Motivate and inspire clients to keep coming back for more with personalised performance tracking. FitMetrix by Mindbody keeps your clients fired up, with gamified workouts and anytime access to their results.

Key customers

Fitness and wellness businesses around the world, from single location studios to some of the world's biggest brands.

Future plans

Mindbody will continue to iterate on its Virtual Wellness Platform—a livestreaming and video on demand platform that was released in 2020 to provide fitness studio owners with additional revenue sources as they navigated the pandemic.

The Virtual Wellness Platform provides a best-in-class virtual service to Mindbody customers that is tightly integrated with the rest of the platform to make it easy to use for our customers and their clients.

Key personnel

- Josh McCarter, CEO
- Phil Coxon, Managing Director, EMEA

"It is our top priority to ensure that F45 franchisees have access to market-leading software and systems and the team at Mindbody is uniquely positioned to support F45 now and into the future."

Adam Gilchrist, F45 Training Co-founder and CEO



The ultimate club experience.

The numbers don't lie - Myzone boosts club visits by **33%** and keeps members around **24%** longer. Talk to us today about growing your business.

Visit myzone.org to find out more.

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Blog: www.myzone.org/blog

www.myzone.org



Jonathan Monks

About us

It's time to give more people more ways to move. Myzone is an innovative heart rate monitor and community engagement tool to track physical activity and calories burned both accurately and in real time. In-club, outdoors and in water, reward effort over image with an immersive fitness experience that gives your people results they can see, based on World Health Organization guidelines for physical activity. Stay connected, organise challenges and create your own community, no matter where your members want to move.

Product range and services

MZ-Switch: The world's first interchangeable heart rate monitor for the gym, outdoors or in water. Wearable three ways, switch between the chest, wrist and arm, depending on your choice of physical activity.

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 pre-set 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, The Bannatyne Group, 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

"If you want your members to get results, you need a monitoring system like Myzone. Myzone has better functionality, and it motivates people to increase the effort they put into their workouts, so we recommend that our members use Myzone for each training session. Currently, approximately 50% of our members are actively using the Myzone belt."

Henrik Gockel, founder and managing director of PRIME TIME fitness



EXPECT MORE

xRide

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.

Octane
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LATERALX

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FITNESS

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Email: mjeffrey@truefitness.com

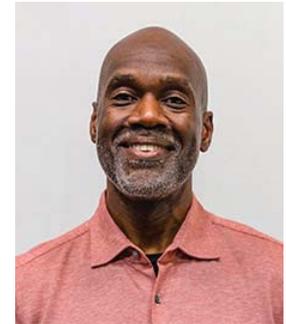
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Michael Jeffrey,

About us

A global innovator in a variety in fitness equipment, Octane Fitness is a TRUE fitness brand which continually reinvents exercise with more unprecedented modalities such as the Rō rowing machine, LateralX, XT-One, xRide recumbent elliptical and AirdyneX. Standout design and innovative programming deliver HIIT and progressive challenges to every level exerciser to drive more motivation and results. Committed to more vision, innovation, long-lasting partnerships and superior service, Octane is a bold master of more.

Product range and services

Octane Fitness invents premium commercial cardiovascular equipment including the xR6000 xRide recumbent elliptical. The xRide now offers a swivel seat option for the active ageing market.

There is the all new Octane Rō rowing machine, with both fan resistance and magnetic brakes for real HIIT power.

The LateralX lateral trainer works different muscles with its variable stride width, while the XT-One cross-trainer offers variable stride length and a ramp, all on the one elliptical. The AirdyneX

air bike offers immense challenge, yet with comfort. The main cardio offers breakthrough programming including Workout Boosters, HIIT training options and advanced training regimes like 30:30 Interval and MMA.

Key customers

Everyone Active, Places Leisure, Nuffield Health, David Lloyd Leisure, Parkwood Leisure, Serco Leisure, Freedom Leisure, The Third Space, JD Gyms.

Future plans

The promotion of the xR6000 recumbent elliptical, which was popular in many gyms and leisure centres, even before the addition of the swivel seat. The promotion of the new Octane Fitness 'Ro'.



Key personnel

- Michael Jeffrey, Director of International Sales, Octane Fitness and TRUE Fitness.

"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 AirdyneX fan bike for the HIIT trainers, Octane continues to be an obvious choice for their increased innovation and variety."

Sarah Roberts, Head of Fitness, Places Leisure



Driving best value
at every stage of your
fitness asset journey.

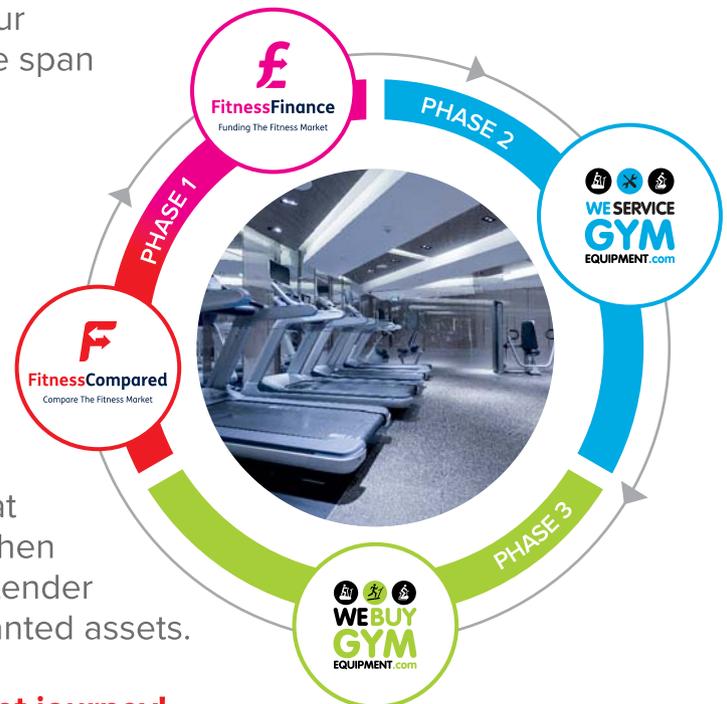


Fitness Equipment: **Purchasing.** **Finance.** **Servicing.** **Residual.**

Learn how more gym operators are switching to our ecosystem to deliver best value throughout the life span of their asset. Increase profitability, go digital and transform the way you manage your fitness asset.

Orbit4 is the umbrella brand for FitnessCompared, FitnessFinance, WeServiceGymEquipment and WeBuyGymEquipment.

The platforms have created the perfect ecosystem that manages and facilitates the commercial fitness product cycle. We've qualified and aggregated the industry's best partners so that gym operators have access to the wider market when looking to purchase and finance gym equipment, tender for service contracts and dispose of or resell unwanted assets.



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Daniel Jones

About us

Orbit4 is the umbrella brand for FitnessCompared, FitnessFinance, WeServiceGymEquipment and WeBuyGymEquipment. The platforms create the perfect ecosystem to manage and facilitate the commercial fitness product cycle. Our platforms are free to join when used individually and a premium service is available for those gym operators who require full automation, extensive reports and an asset management system.

We've qualified and aggregated the industry's best partners so operators have access to the wider market when looking to purchase and finance gym equipment, tender for service contracts and dispose of or resell unwanted assets.

Product range and services

FitnessCompared features products from leading suppliers across cardio, strength, free weights, crossfit, functional training, studio equipment and indoor cycles. Once quotes have been generated, we introduce buyers to suppliers.

FitnessFinance is an in-house finance company enabling customers to access finance when purchasing fitness assets.

We work directly with financial institutions so we can offer competitive rates.

WeServiceGymEquipment supports operators to find a new service provider or compare annual service contracts with the incumbent supplier. We've aggregated the industry's best service providers into one platform.

WeBuyGymEquipment is a commercial online auction platform for operators to buy and sell gym equipment.

Key customers

Everlast Gyms, Holmes Place, JD Gyms, 24/7 Fitness, Anytime Fitness, Fitness First, Kew Green Hotels, Almarose Hotels, Freedom Leisure, easyGym.

Future plans

The new Orbit4 Premium portal will be launched in 2021, offering a unique dashboard to gym operators showing

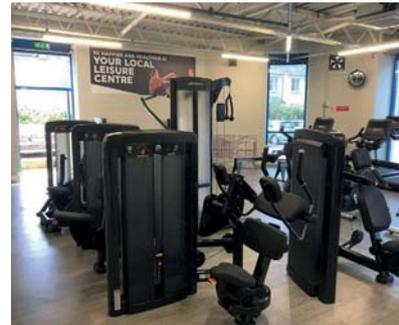
live quotations for fitness equipment and service contracts. In addition, it will show the live residual value of the customers asset at any time during the lifetime of the product. By aggregating partners via each individual platform (FitnessCompared, FitnessFinance, WeServiceGymEquipment and WeBuyGymEquipment), we're able to pull live quotes from the platforms and give true residual values, so that gym operators can assess options at any time.

Key personnel

- Daniel Jones, CEO
- Tracy McCurtin, EMEA Sales Manager
- Paul Mc Cormick, Southern Europe & Africa Sales Manager
- Jo Weelen, UK Sales Manager
- Kate Fearon, FitnessCompared Consultant
- Mike Caruso, WeBuyGymEquipment USA President

"Working with the Orbit4 platform over the past 12 months has made day-to-day processes streamlined and efficient, and we look forward to continuing our partnership with Orbit4 in the future."

Mel Crossland, Head of Fitness, Everlast Gyms



Parkwood
LEISURE

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Parkwood Leisure

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LinkedIn: <https://www.linkedin.com/company/parkwood-leisure/>

<https://www.parkwoodleisure.co.uk>



Glen Hall

About us

Parkwood Leisure is a family-owned leisure management company working with local authority partners across England and Wales. Parkwood offers bespoke management experience in leisure centres, theatres, golf courses, heritage sites and visitor attraction facilities. Our mission is to create strong, lasting partnerships, built on a foundation of efficient and effective delivery to encourage happier and healthier lifestyles. Parkwood doesn't look to drive its corporate identity: its leisure facilities operate under the white label 'Leisure Centre' identity.

Product range and services

Parkwood's unique approach to leisure management is backed by more than 25 years of experience, which has seen the organisation grow to managing more than 80 facilities across England and Wales, for more than 25 local authorities.

Our leisure centres offer an extensive range of facilities, with more than 60 gyms in the network. We also work with partner organisations, including national governing bodies and trade associations, as part of our commitment to promoting physical activity and

wellbeing and enhancing the local communities in which we operate.

We manage six golf courses under our Glendale Golf brand, four theatres, outdoor activity centres and visitor attractions including indoor rainforest zoo Plantasia, and heritage sites Pavilion Gardens in Buxton and Rufford Abbey Country Park.

We also have extensive experience in design, build, operation and maintenance of new-build leisure facilities. Working in partnership with sister company Parkwood Project Management, to date we have led the completed consortia management of 14 new-build projects.

Key customers

More than 25 local authorities and councils across England and Wales including the London Borough of Bexley, Cardiff City, Swansea, High

Peak Borough, North Devon, West Berkshire, Vale of Glamorgan, Rushcliffe Borough, North Somerset, Bristol City, Staffordshire Moorlands and Cherwell.

Future plans

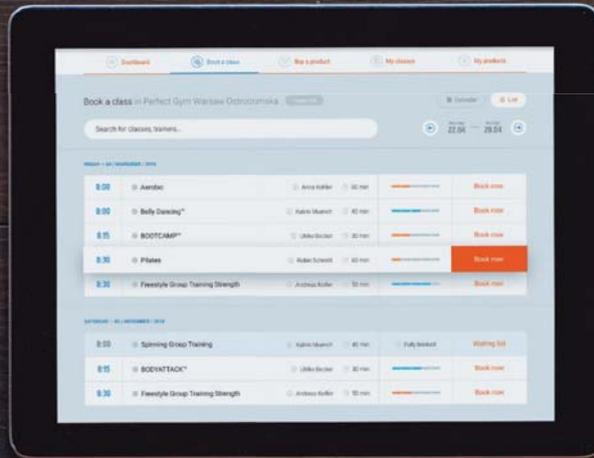
Over the next 12 months, Parkwood Leisure will continue to work collaboratively with our local authority partners to help drive improved mental and physical wellbeing within the communities we serve.

Key personnel

- Glen Hall, Managing Director
- Giles Rawlinson, Commercial & Finance Director
- Alex Godfrey, Operations Director
- Sue McGrath, Group HR Director
- Tom Davies, Sales & Marketing Director
- Mike Worsnop, Business Development Director

"We have enjoyed a fantastic partnership with Parkwood Leisure for more than 10 years. They manage all of our leisure facilities including four leisure centres and Edwalton golf course, and the knowledge, expertise and experience they bring is first class."

David Banks, Executive Manager Neighbourhoods, Rushcliffe Borough Council



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Peter Croft

About us

Founded in 2009, the Perfect Gym is a multi-national gym management software company, responsible for cultivating the newest digital fitness trends and transforming technological advances into actionable tools for our customers.

Product range and services

We offer an all-encompassing solution which elevates fitness:

- Club management - easily accessible member, club and employee data to help make informed decisions.
- Access control - the ability to give or restrict access to specific zones with door readers based on access rules.
- Marketing and automation - allows customers to stay connected with their members through personalised communications.
- Mobile app and member profile - features to effortlessly interact with members, from class bookings to payments, club games and more.
- Billing and Payments - innovative payment solutions for quick and secure transactions through a multitude of local payment providers.
- CRM - maximise clubs acquisition

potential with lead generation tools and convert leads into paying customers.

- BI & Analytics - intelligence-driven processes providing faster data analysis generating actionable information to support clubs business strategy.
- App integration - we have partnered with third party apps like Virtuagym, Strava, Garmin and Polar, and provide an open API for further integration. Some of the new features include contactless entry, automated capacity controls and online class streaming. We offer support on initial implementation and 1-2-1 guided training sessions to optimise software to customer needs, through to data migration, guaranteeing a seamless transition.

Key customers

We work with 1100 clubs in 55+ countries, including Club Towers and The Laboratory Spa & Health Club and 1610 leisure centres, as well as sites in Cockburn and Yarra, Australia.

Future plans

Perfect Gym is continuously working to improve the gym management software to stay ahead of the growing digital

transformation. We plan to be the first choice of software used by every fitness facility in the world.

We are working towards creating a frictionless fitness experience. Through automation and digitalisation, every gym member will be able to purely focus on their fitness journey, elevating the overall experience. Our goal is to help our customers make the transition from a facility of choice to brand of choice by providing a whole life experience for their members.

Key personnel

- Sebastian Szalachowski, CEO and Co-Founder
- Blazej Rychlik, COO
- Peter Croft, Chief Strategy Officer
- John Howitt, UK Business Development Manager

"The Perfect Gym Software and the knowledge of the Perfect Gym team with the support they offer, it's absolutely first class!"

David Prosser, Head of Gold's Gym UAE

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PHYSICAL
FIRST FOR FITNESS SOLUTIONS



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 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 great quality 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 and Ecore Athletic performance flooring 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, Fitness First, KOBOX, Glasgow Life, Shredquarters, Snap Fitness, SIX3NINE, Edinburgh Leisure and many more.

Future plans

The next 12 months will see Physical Company bring our Performance range to market with brand new designs of our Dumbbells, Kettlebells and Barbells joining the Performance Roller and Performance Yoga Mat.



Key personnel

- John Halls, Managing Director
- James Anderson, Director of Sales & Marketing

"What really stood out, and the reason we would definitely work with Physical again for future sites, was the customer service. From our first meeting, it was such an easy relationship: the way they handled our account and our needs was so personal and so responsive."

Dan Baldwin, SIX3NINE

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Steve Carter

About us

Precor Incorporated, headquartered in Greater Seattle, WA, has been a pioneer in delivering fitness experiences for commercial customers for more than 40 years. Precor serves more than 100 countries worldwide with offices in the Americas, EMEA, and APAC and operates two U.S.-based manufacturing locations. Precor segments include commercial clubs/facilities and the verticals of Hospitality, Residential, Corporate, and Education. Precor is a unit of Peloton. Peloton use technology, content, and best-in-class instructors to empower their community.

Product range

Precor products and services span all major categories, including cardio, strength, functional fitness, group training, and connected solutions. Precor began by launching the first ergonomically-sound rowing machine and has developed products that move with the natural motion of the human body ever since. Every breakthrough product and service Precor has partnered with or brought to market has always put fitness first. In 2020, Precor reached the milestone of recording one billion workouts in its Preva® fitness

cloud. That number represents more than 140,000 connected units in over 13,000 facilities. On average, Precor exercisers record more than 20 million minutes of workouts each day as recorded by the Precor digital platform Preva®.

Key customers

Customers include; Anytime Fitness, The énergie Group, Pure Gym and Hilton Hotels, plus numerous single site operators, education facilities, local authorities and trusts.

Future plans

The Precor mission is to develop personalised health and fitness experiences that help people live the lives they desire. Precor understands the need for operators to provide members with a seamlessly connected experience and are investing in research and development to deliver just that. The next year is about creating common



sense synergies between Precor and Peloton so that, in bringing the two organisations together, we get the best of both worlds. Together Precor will be supporting customers to make sure their businesses are solid and stable within the reimagined consumption of fitness post-COVID.

Key personnel

- Steve Carter, Head of Precor UK
- Eva McBride, Marketing Manager Precor UK

“When we were at the stage of choosing the equipment, it was an easy decision. The high-quality look and feel and the overall performance of Precor equipment played a part, but the team’s involvement and experience, and the added value the company offers, secured it for us.”

Zac Passmore, Anytime Fitness Franchisee



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www.pulsefitness.com



Chris Johnson

About us

With an award-winning portfolio of over 450 pieces of cutting-edge, premium fitness equipment, Pulse Fitness is unique in its position as the only company to research, design, develop and build technologically advanced equipment in the UK. The Pulse Group has provided support to more than 30,000 leisure facilities in 30 countries across six continents and currently provides fitness solutions to over 100 UK clubs.

Product range and services

Pulse Fitness offers UK-designed, cutting edge fitness equipment. We offer over 450 pieces of award-winning equipment, including Classic, Dual, Club Line and Premium Strength Lines and numerous lines of cardio equipment including StepMills, curved treadmills, new studio cycling bikes, CrossClimb and AirBike.

Our CV and Premium Strength ranges are complete with 10.1 inch or 18.5-inch touchscreen consoles, giving access to digital entertainment such as Netflix, social media and connectivity to the latest industry wearable devices via Bluetooth. Our product lines also come complete with a wide range of free weights and accessories including premium dumbbells, kettlebells, Olympic plates, lifting platforms and power racks, benches and Olympic bench presses. We offer market leading flooring, functional rigs and functional training accessories, such as the TireFlip 180 and XL. We have an exclusive agreement with Limitless Fitness Equipment to sell the Free Trainer Pro and offer the largest IFI accredited equipment range.

We also have one of largest ranges of support services on offer, including financing or funding requirements on a build project or refurbished equipment.

Key customers

We work with a wide range of private club operators, universities, schools and leisure trusts right across the sector. Our clients range from the likes of Third Space to University of Liverpool to Suffolk Coastal District Council. We are also proud to be an official supplier to the Ministry of Defence.

Future plans

2021 will see the launch of our new app TRAKK, a content platform and activity tracking tool which works with any equipment in any setting. It's free for consumers, can be completely white labelled for operators, and connects seamlessly to any Pulse Fitness products. We are currently working on our website to be able to offer e-commerce capabilities and will be launching our new Classic Strength Line. We also have some fantastic installation projects in the pipeline, some of which have been in the works since 2013.

Key personnel

- Chris Johnson, Managing Director
- Richard Sheen, Commercial Sales Director

"We have been thoroughly impressed by Pulse Fitness. Their equipment incorporates the very best in British design alongside some of the most innovative and advanced technology from around the world."

Rob Beale, Fitness Director, Third Space



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Ben Brand

About us

Quoox offers a next-generation all-in-one gym and fitness studio management solution, which saves you time and money, helping you stay in control of your business and offer a premium service.

Product range and services

With more than 200 integrated features, we are confident we offer a solution for every gym and fitness studio owner to help run a streamlined business. Our valued programmes boost performance and member retention, and comprise an array of lead attraction and conversion features to help your business grow.

Our flexible and intuitive booking and payment options make sure you get paid on time with immediate notifications and resolutions, as well as maximising attendance and promoting up-selling.

A member's portal provides a

customisable branded member area and website, complementing our mobile app.

Quoox's enhanced artificial intelligence allows you to know when your members are at risk of dropping, while analysing behaviour, rewarding efforts, and resolving issues before they arise.

Focusing on community by providing unique elements to engage members, Quoox builds unparalleled retention and strong loyalty to your brand. As official Myzone partners, Quoox's integration is positioned to motivate members and guarantees the finest member experience, both whilst in, and away from the gym – facilitating easy account set up; session metrics; and belt sales.

We provide a full life-cycle management solution, covering everything from lead generation through to member retention, with lead attraction and conversion features, engaging campaigns and the

ability to easily create landing pages. The option to promote these with one-click posting to your social media channels, as well as automated reach-outs maximises sign-ups and saves you time.

Key customers

We specialise in boutique training gyms and fitness studios, whose main goal is to provide exceptional service to their members while also growing and expanding their business.

Future plans

Quoox continues to evolve, with more than 50 new features added in 2020 and this year will see further development.

Intrinsic to our core values, customers do not pay for extra features, everything is included for a single price. We believe all new features we develop will benefit all our customers, and they should be made available at no extra cost.

Key personnel

- Ben Brand, Co-Founder
- Chris Windram, Co-Founder
- Ollie Ellis, Head of Customer Success
- Annabel Dines, Head of Communications

"I've been in the fitness industry for 17 years, and there is no system that compares to what the Quoox system offers. It was remarkable how fast we could merge and transition our entire gym management system over from multiple different platforms all into the Quoox software."

Joseph Garcia, Program Director of Arena Fitness Training Centre (US)



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SAFE SPACE
THE CHANGING ROOM EXPERTS



Dominic Hyett

About us

Safe Space has over 25 years of experience in the UK leisure and fitness industry, offering a highly professional and reliable service. Whether you are 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 clients from design and consultation, through to bespoke manufacture and installation. We also offer customers after sales and servicing solutions. Products include lockers, benching, dry and wet vanities, shower and toilet cubicles.

We also offer SUITMATE swimsuit water extractors which remove 95% of water from swimwear in 8 seconds. We supply all locking mechanisms for our clients based on their requirements and specification, including latch, combinations, coin return, digital and RFID technology.

Key customers

Nuffield Health, Hilton Hotels, JD Gyms, ènergie Fitness, TRIB3, Sports Direct, Digme, 3D Leisure, Lifestyle Fitness, Fitness4less, Westfield Health,

Everyone Active, InspireAll Leisure, Runnymede Hotel & Spa and the Majestic Hotel & Spa in Harrogate.

Future plans

After being named the official distributor of SUITMATE in England, Scotland and Wales, we will continue to work on our product development to improve our offering for customers.

Shows attending

SWEAT, FIBO - as further events get confirmed through the year we will be deciding which to attend.

Key personnel

- Dominic Hyett, Managing Director
- Gregg Rumble, Sales Director
- Gary Hyett, Operations Manager
- Sally Baker, Finance Manager

“Having worked with Safe Space for TRIB3 installations in the UK and Europe, I have no hesitation in recommending them. We’ve continually developed what locker rooms offer through the expansion of TRIB3 and Safe Space were invaluable in offering advice on unique looks we can achieve.”

Kevin Yates, CEO, TRIB3



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Michael Ellis

About us

ServiceSport (UK) Ltd is Europe's leading independent service provider. Our mission is to supply gym parts and equipment to the fitness industry, and provide independent technical support with an impartial view to maintaining both resistance and cardiovascular equipment.

Product range and services

ServiceSport (UK) Ltd specialises in maintaining, servicing and re-manufacturing all brands of cardiovascular and resistance gym equipment as well as selling brand new equipment from market leading manufacturers.

In addition, ServiceSport (UK) Ltd refresh existing gym equipment. This



process includes extraction of gym equipment from site, replacing worn parts, sandblasting the frame to bare metal, powder coating in a colour of the customer's choice and installing the kit on site. Over the years, ServiceSport (UK) Ltd has been recognised as the go to place for upholstery repairs. Carrying out

repairs to worn and torn pads on strength equipment, multi-benches and even sofas. This can include bespoke colours and professional embroidery of the pad too.

ServiceSport (UK) Ltd has recently diversified and now supplies bespoke custom branded workwear including t-shirts, fleeces, blouses, jackets and hoodies. We also have an electronics department that carries out repairs to monitors on cardio-vascular gym equipment.

Key customers

MOD, Nuffield Health, blue light services, public and private fitness club operators, football clubs, schools and universities, hotels and spas.

Future plans

To continue supporting fitness operators by prolonging the life of their gym equipment.

Key personnel

- Colin Marriott, Owner/Founder
- Matthew Eckersley, Sales Director
- Chris Crane, Operations Director
- Michael Ellis, Commercial Director
- Graham Wood, Chief Finance Officer

"This is the third year in a row that I have chosen to use ServiceSport (UK) Ltd for our gymnasium requirements. I find the customer services department ruthlessly efficient, and the maintenance team very professional with the way that they operate. Working within a military training environment, it is vital our equipment is in the best condition possible, and ServiceSport (UK) Ltd help us achieve this. Recent embroidery works conducted have really added a wow factor to the gym, turning our run down kit into kit that looks new again."

Christopher Walsh, MOD



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www.technogym.com



The Wellness Company



Nerio Alessandri

About us

Founded in 1983, Technogym is a world leading international supplier of technology and design-driven products and services in the wellness and fitness industry. With over 2,000 employees across 14 branches, Technogym is present in over 100 countries. More than 65,000 wellness centres are equipped with Technogym and 35 million users train every day on Technogym equipment. Technogym was the official supplier for the past seven Olympic Games, from Sydney 2000 to PyeongChang 2018.

Product range and services

Technogym provides a complete range of best-in-class cardiovascular, strength and functional equipment for both professional and home use. We have also developed an ecosystem of smart applications, consoles and networks to help operators engage end-users both inside and outside the gym, and run their facilities more efficiently. Our end-to-end wellness solution includes consultation, training and certification, marketing support, interior design, installation and maintenance, technical support, warranty and service contracts, and financial solutions.



Key customers

Technogym supplies clubs, hotels, spas, rehabilitation centres, corporate gyms, universities, sports facilities, homes and more.

We are proud to supply our solutions to some of the world's elite athletes and teams including the Ferrari and McLaren F1 teams; football teams Paris Saint-Germain, AC Milan, Inter Milan and Juventus; and Team Luna Rossa Challenge sailing team.

Key personnel

- **Nerio Alessandri**, Founder and President
- **Steve Barton**, Managing Director, UK
- **Paul Morris**, Sales Director (Consumer), UK
- **Steve Ruffell**, Sales Director (Club), UK
- **Nev Jones**, Sales Director (Health, Corporate & Performance), UK
- **Kieran Tracey**, Sales Director (Hospitality & Residential), UK
- **Craig Swyer**, Marketing Director, UK

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Andy Roberts

About us

Total Vibration Solutions Ltd (TVS Group) includes TVS Sports Surfaces, TVS Gym Flooring, TVS Play Surfaces and TVS Acoustics. Our business is balanced through a broad portfolio of products and a presence across multiple industries. Our strategy focuses on supplying best in class materials, building mutually beneficial partnerships with our suppliers while delivering outstanding levels of customer service.

Product range and services

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. We are also the UK's exclusive supplier of Robbins Sports Surfaces, enabling us to offer high performance hardwood sports flooring systems, such as the Robbins MVP and BIO-CHANNEL, in the UK.

Key customers

In the fitness industry we work closely with the team at Pure Gym and we also supply gym flooring to a number of big hitters including Anytime Fitness, The Gym Group, JD Gyms, Sports Direct and Everyone Active.

Future plans

We are evaluating the performance characteristics of a number of products, including a new impact-resistant acoustic wall panel for indoor sports facilities which we hope to unveil soon.



Shows attending

Hopefully, this year we'll be able to exhibit at ELEVATE at London's ExCeL on the 28th-29th September.

Key personnel

- Andy Roberts, Sales Director
- Paul Lafone, Managing Director
- Patrick Dent, Technical Director
- Christopher Taylor, Projects Director

This is our first time working with the team at TVS Group and it is safe to say it won't be the last. The installation itself is fabulous and we look forward to many years use of our fantastic new sport facility.

Vickie Keeling, Trust Director, United Endeavour Trust.

Why is Venueserve Fitness a good fit for your customer?

- ▶ Live audio and visual two-way streamed classes with the instructors they know and love
- ▶ Access to a huge bank of pre-recorded virtual classes
- ▶ Online booking for group workouts or 1:2:1 sessions through the platform
- ▶ Branded content that looks and feels like your club
- ▶ Maintain and grow relationships and customer engagement
- ▶ A secure platform gives customers and instructors peace of mind
- ▶ A live streamed alternative when classes are full

CONTACT

- ▶ +44 (0) 207 112 8078
- ▶ sales@venueserve.com
- ▶ <http://fitness.venueserve.com>

Two-way interactive live streaming service from **venueserve fitness**

Venueserve's **white label** fitness platform launches **live two-way interactive streaming** for one-to-one or one-to-many training sessions - perfect for today's blended gym memberships, online group workouts and personal training.

Give your customers a personalised, interactive fitness approach through our safe, secure platform.

The two-way audio and visual live streaming allows trainers to build an online community with meaningful engagement that delivers comprehensive feedback and support.

Venueserve Fitness keeps your fitness brand and your members working out together, no matter where or how they choose to train.

Add value to your offer with flexible memberships for new and existing customers through Venueserve Fitness.

Venueserve Fitness

2 Denmark Road, Guildford,
Surrey, GU1 4DA, UK

Tel: +44 (0) 207 112 8078

Email: sales@venueserve.com

Facebook: <https://www.facebook.com/VenueserveFitness/>

LinkedIn: <https://www.linkedin.com/showcase/68124367/admin/>

Instagram: <https://www.instagram.com/venueservefitness/>

www.fitness.venueserve.com



FITNESS



Lee Booth

About us

The fitness arm of global tech company Venueserve, which has a well-established reputation within ticketing and sports membership, Venueserve Fitness is an easy-to-use, white label, cost effective web and mobile web-based online exercise platform.

Product range and services

Operators can kickstart their virtual health club through Venueserve's secure platform - all branded as their own, for pre-recorded, live and now two way/ interactive live streaming.

Venueserve's live two-way interactive streaming is ideal for one-to-one or one-to-many training sessions, supporting today's blended gym memberships, online group workouts and personal training.

The two-way audio and visual live streaming allows trainers and clubs to build an online community through meaningful engagement that delivers comprehensive feedback and support. Clubs can live-stream their own expert instructors, delivering the classes their members know and love, ensuring content feels authentic and recognisable, and helping with customer engagement

by giving members the same positive experience they have in-club and making the club accessible anywhere and anytime.

Venueserve's built-in dashboard gathers valuable membership data and insight, not available via Facebook Live or Zoom, whilst the backend reporting and payment system means Personal Trainers or instructors, such as yoga teachers, can use the subscribe, data capture function as their own membership system.

Key products

Venueserve Fitness keeps your fitness brand and your members working out together, no matter where or how they choose to train.

- Interactive live audio and visual two-way streamed classes with the instructors they know and love
- Access to a huge bank of pre-recorded virtual classes

- Online booking for group workout or 1:2:1 sessions through the platform
- Branded content that looks and feels like your club
- Maintain and grow relationships and customer engagement
- Venueserve's safety features protect instructors from unwanted attention they might receive through other live stream platforms
- A live streamed alternative when classes are full

Key customers

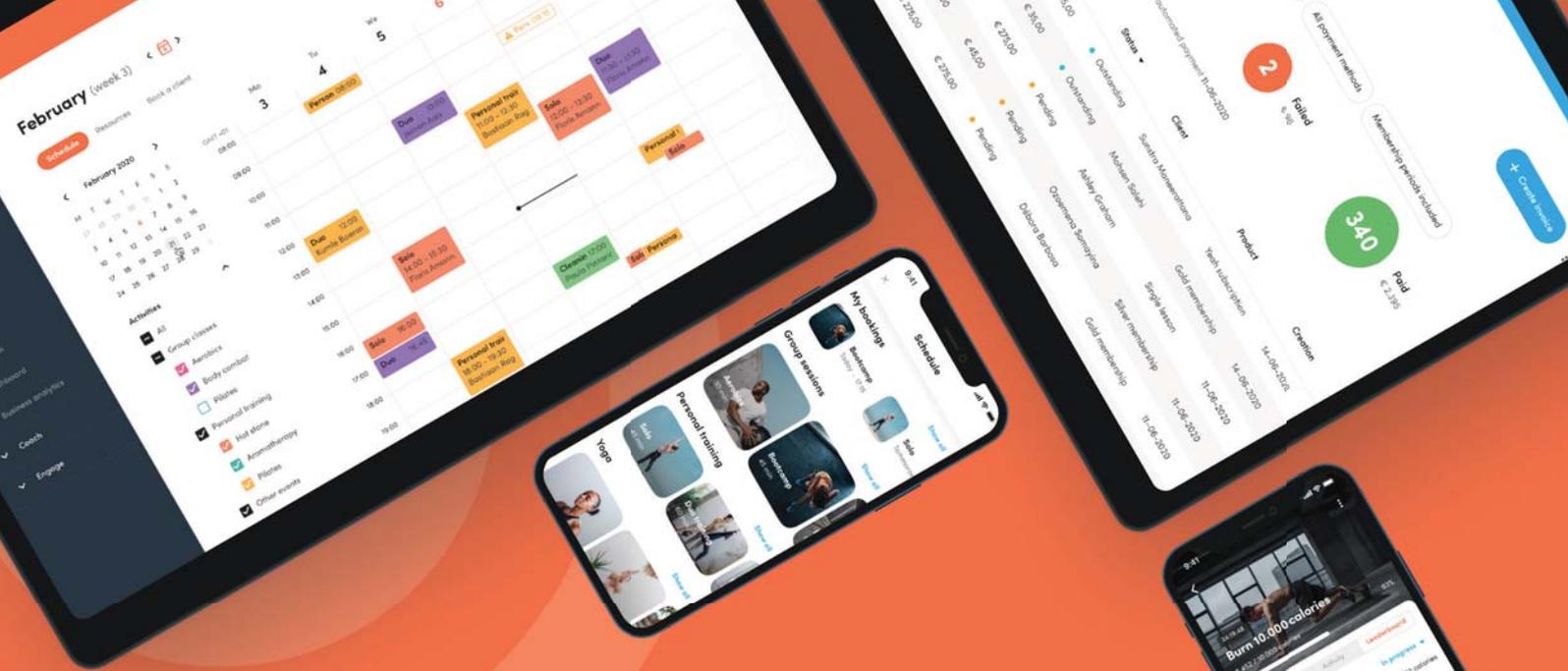
Marlow Club, Roehampton Club, Pavilion Club, The Health Club Collection.

Key personnel

- Lee Booth, CEO and Founder
- Jonathan Symonds, COO
- Simon Downes, Sales, Operations and Commercial Director

"Our live two-way streamed classes feature our instructors doing the classes our members love. It means the Marlow Club can be accessed by our members anywhere and anytime. It adds value to our membership offer and aids our customer retention - it's a service we will never be without."

Jon Williams, CEO, Marlow Club



The #1 All-in-One Software

Retain members, save time and generate new revenue streams through:

Membership Management · Scheduling · Payment Processing · 1000+ workouts · Challenges
Digital Membership · Meditations

Used by 16 million consumers, 8.500 gyms and 30.000 trainers worldwide



Virtuagym

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Tel: +31 20 716 5216

Email: support@virtuagym.com

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

LinkedIn: [@Virtuagym](https://www.linkedin.com/company/virtuagym)

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

Blog: <https://business.virtuagym.com/blog/>

<https://virtuagym.com>



Hugo Braam

About us

Virtuagym was created with one mission - to make the world a healthier and happier place through technology. We are now a global provider of fitness technology for management, coaching and engagement working with 8,500+ fitness businesses and corporate wellness providers. We offer a comprehensive platform that combines tools for management with industry-leading solutions for coaching and engagement, all within one intuitive platform and whitelable mobile app framework.

Product range and services

Virtuagym makes it easier for fitness enterprises to give their clients a fantastic 24/7 training experience, whether they are in the gym or at home. This is done through our range of innovative digital engagement services, from virtual training

to live workout videos, meditations, challenges, and more. Our all-in-one fitness management software deals with important areas such as payment, scheduling, coaching and member management and communication, keeping end-users more engaged and business processes more efficient.

Shows attending

Workout Anytime Conference, FitFair 2021, FitNation Lunch & Learn webinars every other Thursday.

Key customers

Virtuagym supports more than 16 million consumers, over 8,500 fitness businesses and 30,000+ trainers around the world. We work with fitness businesses and entrepreneurs of all shapes and sizes, as well as corporate wellness providers.



Future plans

To help fitness providers pivot to hybrid models with combined digital and physical services, enabling them to offer complete holistic health and wellness experiences at home and in the gym.

Key personnel

- Hugo Braam, Co-founder & CEO
- Paul Braam, Co-founder & CEO
- Simon Aurik, CCO & CMO
- Quinten Francken-Bosman, COO
- Wijnand van de Calseijde, CFO

Virtuagym's software helped us to create a strong member community. We love the interactive app that enables our clients to achieve their goals whilst having fun. The payment technology provides greater flexibility and allows us to be more cost and time efficient.

Beth Johnston, Co-owner, The Body Content



icelab

BECOME THE COOLEST
PLACE AROUND!



Zimmer MedizinSysteme GmbH

Junkersstraße 9, Neu-Ulm, 89231 Germany

Tel: 0049 (0)731 97 61-253

Fax: 0049 (0)731 97 61-118

Email: b.baeurle@zimmer.de

Facebook: www.facebook.com/ZimmerMedizinSysteme

www.zimmer.de

icelab
Zimmer
MedizinSysteme



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 products in the fields of cardiology, diagnostics and aesthetics as well as software complement our product range. In 1996, Zimmer MedizinSysteme built the very first Whole-Body-Cryo-Treatment System and developed it ever since. Today we offer "cool solutions" from local cryo-treatment to various single-cabin systems to the professional multi-room system with -110 °C.

Product range and services

During a Whole-Body-Cryo-Session your body is exposed to ultra-cold but very dry air for up to three minutes. The positive effects of this quite pleasant treatment have been known and used for many years. The treatment can either be offered on its own, combined in spa packages, within fitness, sports and leisure packages, and even be part of medical spa offerings.

With our recently updated product range, we are now able to offer solutions for beginners, private users and professional users:

icelab_VIP: The entry into the world of Whole-Body-Cryo-Treatment - compact and uncomplicated.

icelab_VIP+: The plus in performance and space - compact, quiet and powerful.

icelab_VIPspecial: Strong performance with maximum flexibility - customisable system, as special as you need it.

icelab_PRO series: The system for professional use with up to -110 °C perfect for health oriented customers, available with two or three rooms, wooden interior, Heat-Recovery-System and the possibility to customise it to your needs.

USPs

Imagine a short treatment combined with many positive and long-lasting effects that your customers will love. With icelab, your company has a unique product that stands out from the rest.

More than 25 years on the market, various individual projects, our high-quality products (100% made in Germany) and our reliability have earned us the trust of more than 200 customers worldwide. With our recently updated product range and our extended service network with partners worldwide, we are

continuously developing and improving our after-sales service quality. All our systems are very easy to operate and run entirely on electricity. 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?

Zimmer MedizinSysteme is headquartered in Neu-Ulm, Germany. We work worldwide directly or with our local partners.

Future plans

Continue to outperform the growth we have experienced in the past few years.

Key personnel

■ Benjamin Bäurle, Sales Manager icelab.

PRODUCT INNOVATION

Emma Canning rounds up the latest product launches in health and fitness

Technogym's Excite Live: where exercise and fun collide

Italian based Technogym has launched an exciting new training experience through its advanced cardio range, Excite Live. The seven-piece range aims to combine exercise and fun to change the way we train and make it a comfortable and enjoyable experience.

Excite Live was designed with four things in mind – tailored training variety, connectivity, 'space-savvy' and sustainability.

With Technogym Coach built into every piece users will be kept motivated and supported throughout their exercise time. The virtual trainer guides you through sessions based on your own personal goals with encouragement and suggest ways to heighten the level of

"Excite Live was designed with four things in mind – tailored training variety, connectivity, 'space-savvy' and sustainability"

intensity, which you are free to follow or alter.

Excite Live's mobile connectivity allows users to go about their daily life while exercising: browse the internet, chat with friends, scroll through social media or watch shows on Netflix on the 10" LCD touchscreen.

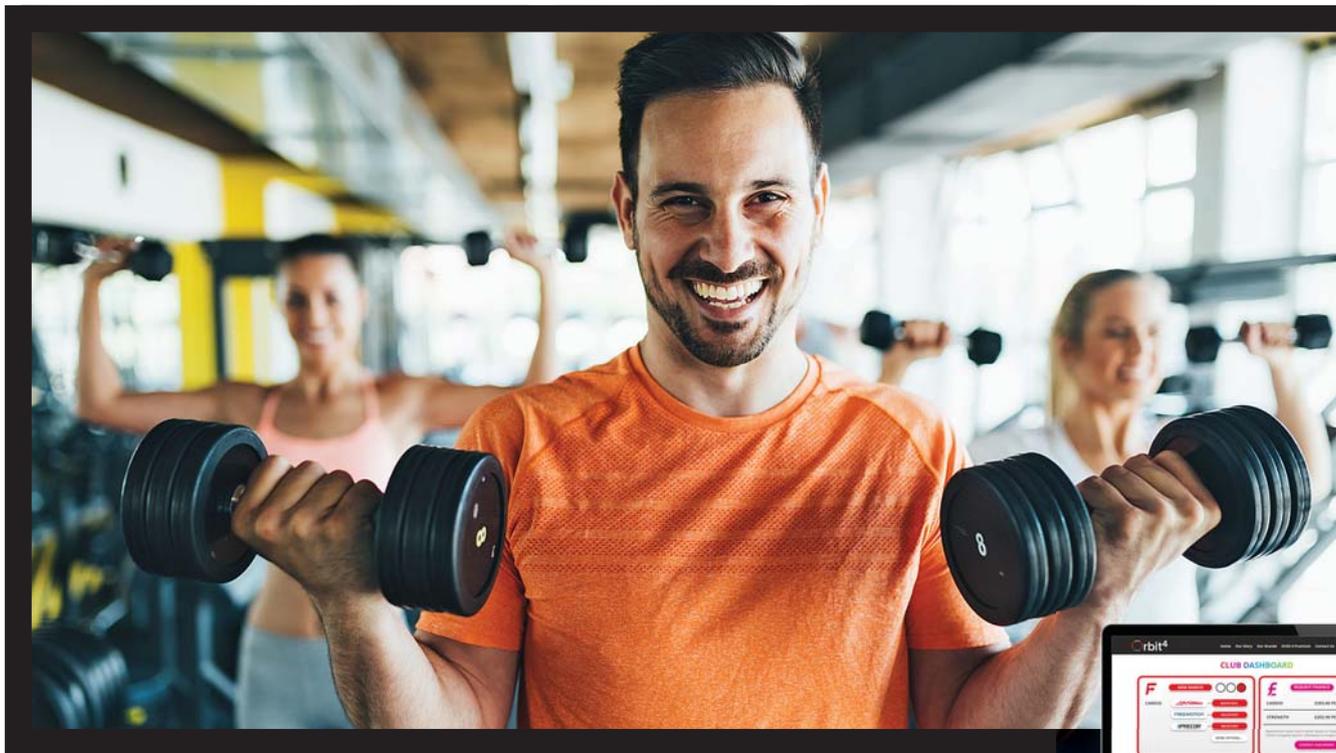
Technogym redesigned Excite to make more room so you can move comfortably on each piece of equipment. The new line provides greater stability and 13 per cent more space for running and is made of recyclable parts which don't require electricity or batteries.

Jamie Groves, Managing Director of Club Nova, said: "Excite Live is truly cutting-edge, we've always been early adopters and the product allows us to fully utilise Technogym's astounding functionality and software, adding immense value to our customer experience."



Excite Live includes a virtual trainer to guide users

fitness-kit.net KEYWORD [Technogym](#)



Orbit4 transforms the way gym equipment is bought and sold

Based in Cheshire, Orbit4 is the umbrella brand for FitnessCompared, FitnessFinance, WeServiceGymEquipment and WeBuyGymEquipment, creating an ecosystem which manages and facilitates the commercial fitness product cycle. This allows gym operators to have access to a wider market when looking to finance and purchase gym equipment, tender for service contracts, and dispose of unwanted asset.

"We've been buying fitness equipment, renewing service contracts, managing and

disposing of assets in what some would say is an archaic way for far too long," says CEO Daniel Jones. "The automotive industry has made digital the norm for purchasing, servicing and trading-in.

Our industry needs to seriously catch up with the rest of the world and Orbit4 is the perfect solution. Pure digital transformation is here!"

With two years' operating experience in the US and EMEA, Orbit4 wants to partner with companies which share its values. Each company goes through a vetting process when a new



PHOTO: SALLY BAKER PHOTOGRAPHY

"The automotive industry has made digital the norm for purchasing, servicing and trading-in. Our industry needs to seriously catch up"

Daniel Jones

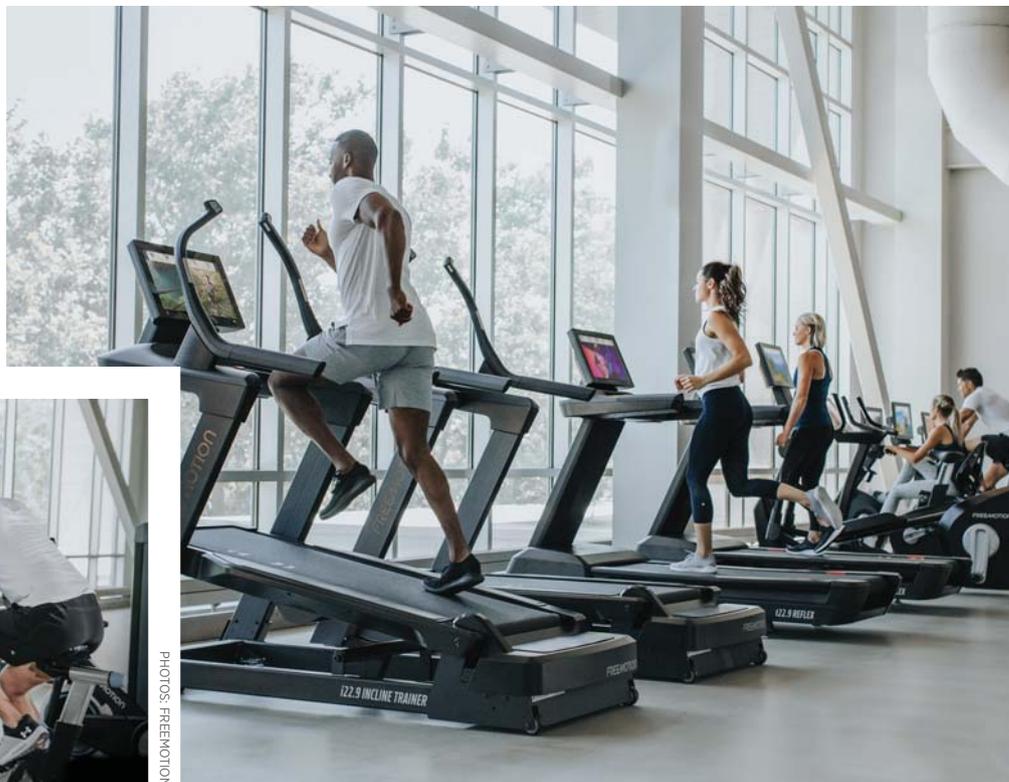
enquiry comes from a supplier, service provider or trader and each business must hold relevant insurance, an element of experience within the sector and sustain a positive reputation.

CEO Daniel Jones says: "If your fitness business is more environmentally friendly, then it will appeal to a passionate and loyal customer base. Orbit4 will help you do that while reducing your expenses and cutting the negative environmental impact of your business."

fitness-kit.net KEYWORD



Powered by iFIT, Freemotion's new range allows gym goers to run in exotic locations such as Thailand and Austria



PHOTOS: FREEMOTION

▶  PHOTO: FREEMOTION

“Users are able to virtually follow their trainer through on-demand workouts across 10 million miles of exotic locations”

Dan Toigo

Freemotion and iFit combine for an immersive new range

Powered with iFit integration, Freemotion's latest range enables gym goers to simulate runs and rides around the world, giving users a sense of travel and immersion without leaving the gym.

Users are able to virtually follow their trainer through on-demand workouts across 10 million miles (16 million km) of exotic locations, such as Thailand, Austria, and Italy,

via Google Maps integration provided by interactive, connected fitness platform iFit.

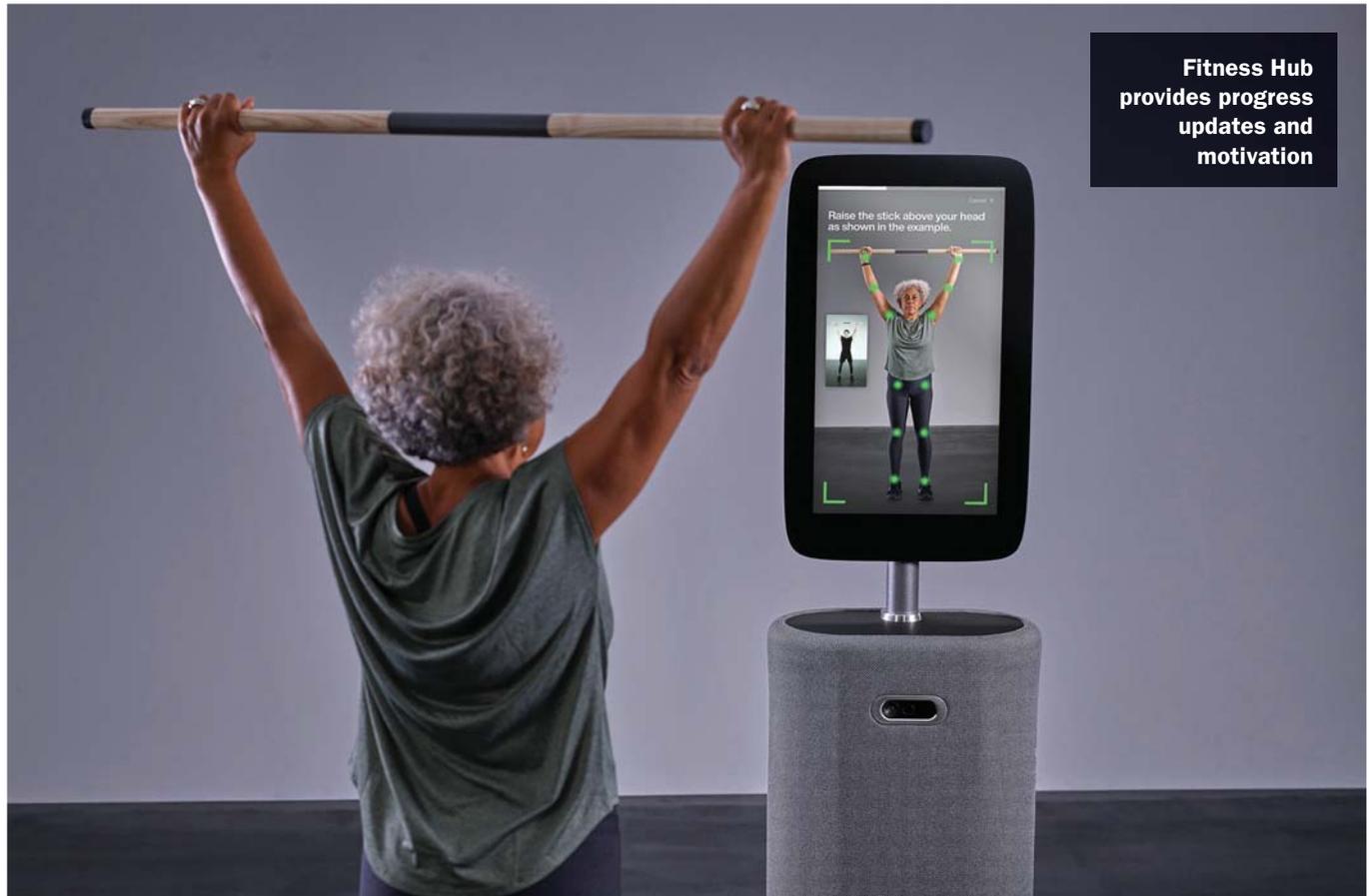
With more than 100 world class trainers and thousands of workouts available, users are sure to find the style and coach which works for them.

The new line enables content-driven experiences which motivate members while allowing them to stay connected outside the gym through their iFit-enabled home

fitness equipment. Users need only download the iFit app and pair their device with the equipment, log in and start training.

Freemotion's Dan Toigo, says: “We've put people at the heart of the development of this new range to deliver a fully interactive, engaging and immersive experience.”





Fitness Hub provides progress updates and motivation

PHOTO: EGYM

EGYM's Fitness Hub is designed to benefit operators, trainers, and members

A new gym centrepiece from EGYM, Fitness Hub delivers performance tracking and self-serve onboarding via Microsoft 3D cameras and machine learning.

This new development takes member support to a new level by providing touchless onboarding in just two minutes. The intuitive user guidance

allows members' workout progress to be measured independently without an instructor. Fitness Hub also provides continuous motivation by providing progress updates to visualise every achievement.

"In introducing Fitness Hub, with its contactless set-up, performance assessments and feedback, we're driven by the

vision that the gym works for everyone," says EGYM CEO Philip Roesch-Schländler.

Using a body scan, EGYM's Smart Strength and Smart Flex Series are able to set up a profile automatically, while assessments can be accessed allowing improvement tracking.

fitness-kit.net **KEYWORD** EGYM 



PHOTO: EGYM

"EGYM's new development takes member support to a new level by providing touchless onboarding in just two minutes"

Philip Roesch-Schländler ▶



PHOTO: MYZONE/ANTHONY GREENWOOD

The new MZ-Switch can sit on the chest, wrist or forearm.



PHOTO: MYZONE

“MZ-Switch enables users to monitor their performance and earn Myzone Effort Points (MEPs) for every type of physical activity, whether that be exercising outside or even swimming.”

Dave Wright

Myzone adds to its range with the MZ-Switch

Myzone, a wearable heart rate system, has announced the launch of MZ-Switch, a mobile heart rate monitor which can sit on the chest, wrist, or forearm. This new line joins the existing Myzone belt which sits on the sternum.

Myzone CEO, Dave Wright, describes the patent-pending MZ-Switch as “the first interchangeable heart rate

monitor of its type. The new monitor is built off the existing structure of Myzone tech, allowing the company to extend its reach in the wider consumer and wellness markets.”

Available in a range of colours, MZ-Switch enables users to monitor their performance and earn Myzone Effort Points (MEPs) for every type of physical activity, whether that be exercising outside or even swimming.

MZ-Switch collects data in real time to understand work output and recovery, enabling live results.

Although Myzone already has the MZ watch, it doesn’t collect data as MZ Switch does. It also has up to six months of battery life and the ability to store up to 30 hours of exercise data.



OJMAR debuts new touchless lock OCS SMART

Locking solutions manufacturer, OJMAR has unveiled OCS SMART, a revolutionary new lock which can be controlled via mobile phone, tablet, or smart watch by using the latest Bluetooth technology. When paired with the OCS SMART app, installation and usage is easy.

Equipped with a wide range of manager and user programable features, including private and public settings, audit trails, scheduled automatic openings, rental duration, and the ability to allocate lockers via QR code or permits sent via email or social media, plus up to five and a half years battery life.



“OCS SMART allows your locker system to become truly hands-free”

Aitor Elorza

“OCS SMART allows your locker system to become truly hands-free,” says sales and marketing director, Aitor Elorza. “In the current climate the power of OCS SMART is most evident by minimising touchpoints, which promotes overall hygiene.”

The keypad is also smooth, crevice-free and waterproof, making for easy cleaning. As it is a wireless system it is also easy to install with no cables or complex wiring. A software development kit is also available to allow seamless integration with in-house applications.



OCS SMART can be controlled via a mobile phone, tablet, or smart watch

fitness-kit.net **KEYWORD** Ojmar

Keepme V2 uses artificial intelligence to retain members

Keepme’s latest V2 platform uses artificial intelligence to help monitor customer journey and inform them on how and when to engage members who are thinking of leaving.

Building on the original version of Keepme, the sales and marketing platform blends AI, operational tools, and an automation engine in order to streamline actions to attract, retain and re-engage health club members. This is done by

driving additional revenue and increasing profitability at every stage of the membership cycle.

The AI engine is at the heart of the technology. It helps operators make data-driven decisions to integrate different tools and maximise revenue. The sales playbooks and automations ensure every lead is followed up while the AI evaluates them and funnels them into tailored sales flows.

“Following the fallout from COVID-19, it’s more important



“Keepme V2’s AI, operational tools and automation engine streamline actions to attract, retain and re-engage health club members”

Ian Mullane

now than ever for fitness operators to understand their customers and I’m confident Keepme V2 will give the industry the necessary tools to tackle its challenges,” says Ian Mullane, founder, and CEO of Keepme. “V2 presents a step change in club technology, enabling operators to increase profitability at every stage of the membership cycle.”

fitness-kit.net **KEYWORD** Keepme

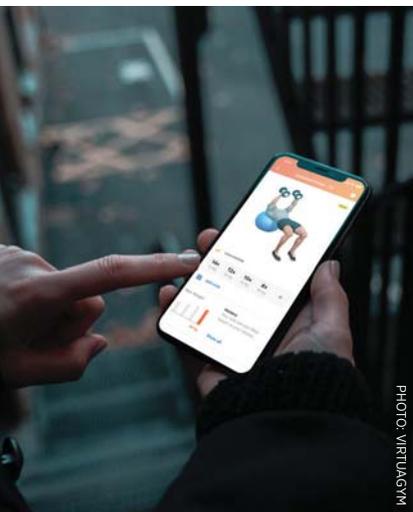


PHOTO: VIRTUAGYM

Virtuagym PRO+ is a ready made digital package for club's to offer through their apps

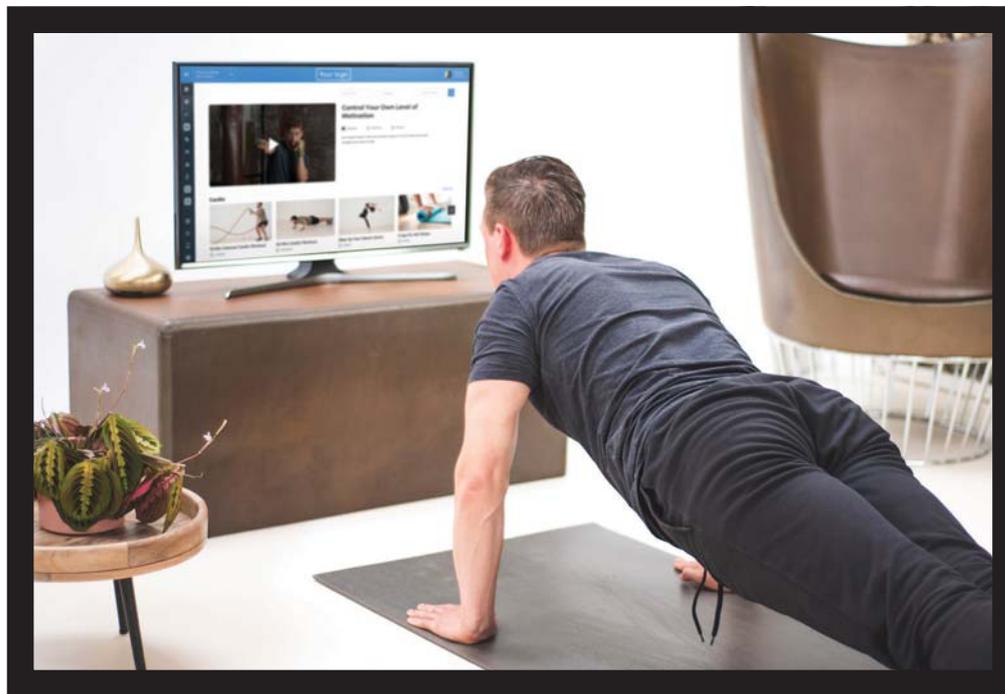


PHOTO: VIRTUAGYM

► **Virtuagym** launches turnkey digital membership experience

Virtuagym, a leading provider of fitness technology for gyms and trainers, launched PRO+ earlier this year: a turnkey digital membership experience run through club's own mobile apps.

PRO+ is composed of a wide array of content, including weekly community group updates on nutrition, training and wellness, more than 200 virtual trainer workouts, monthly prize challenges, more than 1000 licensed workout videos, plus a library of audio

meditations for a holistic wellness experience.

"While clubs were closed, it was essential for providers to adopt digital technology to keep their members engaged and revenue going," said Hugo Braam, CEO of Virtuagym.

"However, offering a rich and engaging digital content subscription which people are willing to keep paying for is not easy and requires a lot of resources, which is why we developed Virtuagym PRO+."

Virtuagym's Corona Impact

Study, across 6000 European fitness businesses, revealed app usage increased by 340 per cent in 2020, while the creation of training plans increased by 100 per cent at the start of the pandemic. From January to October last year, Virtuagym saw a 175 per cent increase in group class bookings, reflecting people were eager to stay connected when training, either in a physical location or online.



PHOTO: VIRTUAGYM

"App usage increased by 340 per cent in 2020, while the creation of training plans increased by 100 per cent at the start of the pandemic."

Hugo Braam



Hammer Strength Box brings the best for small group training

American fitness company, Life Fitness, has launched the Official Hammer Strength Box, a unique small group training offering from performance training specialists, Hammer Strength.

The Box comes in response to the reopening of gyms as the fitness industry recovers from the coronavirus pandemic. It allows members to engage in training experiences and social interaction within a small group setting.

Suitable as a standalone studio or as an in-club solution, the flexible design means the space can be multifunctional and used for personal training or individual workouts also.

The Hammer Strength Box includes over 30 preconfigured workouts, designed with maximum variation and effectiveness for participants of all abilities. With workshops delivered as part of all installations, trainers are supported with programme delivery, which allows instructors to focus on form and coaching techniques.

“An all-in-one solution, it brings together best-in-class equipment, effective workouts, and a motivational environment designed to inspire and help members get results,” says Frank



PHOTO: LIFE FITNESS

“An all-in-one solution”

Frank van de Ven

van de Ven, VP International, Life Fitness. “For facilities, it’s an exciting, unique selling point which will drive member retention and acquisition.”

Made up of three workout zones, The Box brings premium strength, functional and cardio performance training equipment to deliver an intense group training programme for up to 12 participants.

fitness-kit.net KEYWORD

Life Fitness 



PHOTO: MAX WUERTEMBERGER

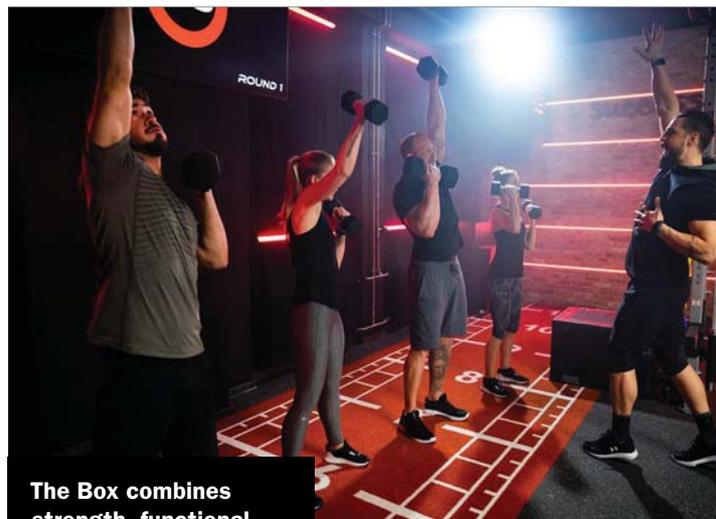


PHOTO: MAX WUERTEMBERGER

The Box combines strength, functional and cardio performance training equipment



PHOTO: MAX WUERTEMBERGER



LISTINGS

HCM

HANDBOOK
2021–2022

LISTINGS

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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.

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.

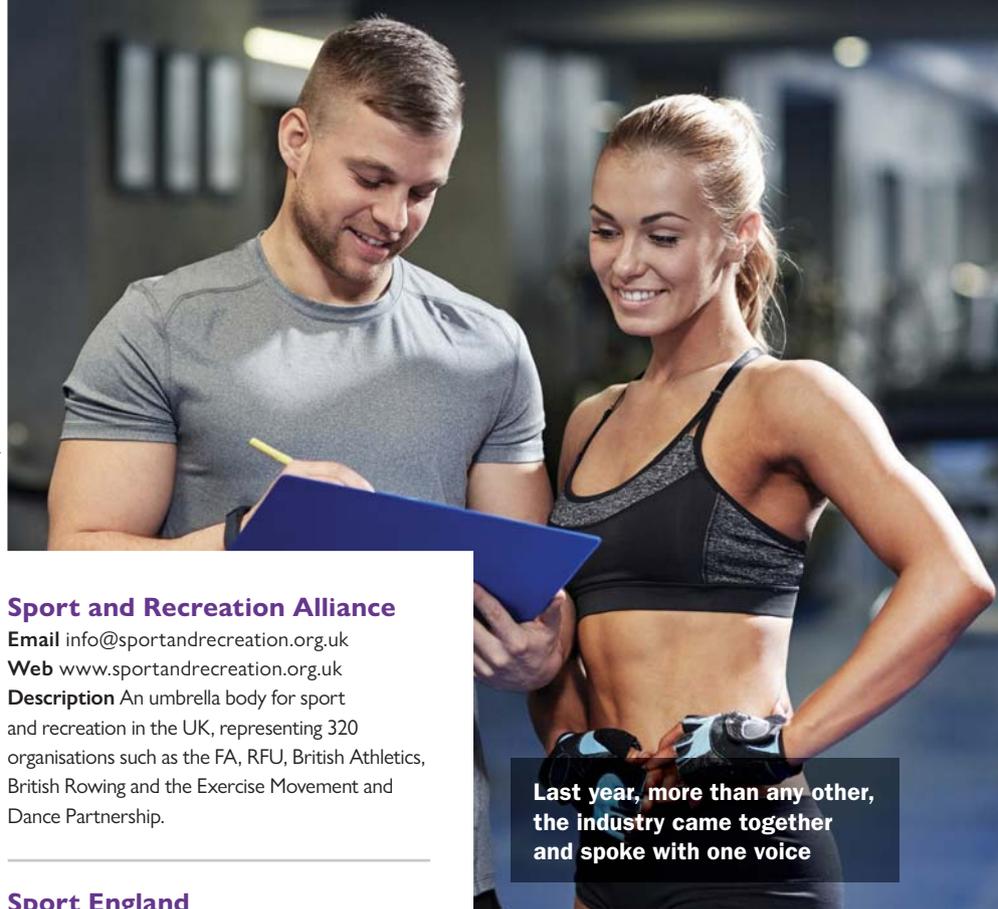
Register of Exercise Professionals (REPs)

Email info@exerciseregister.org

Web www.exerciseregister.org

Description REPs – 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.

SHUTTERSTOCK/SYDA PRODUCTIONS



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.

Last year, more than any other, the industry came together and spoke with one voice

UK Spa Association

Web www.spa-uk.org

Description The UK Spa Association 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.

Supplier contacts

Contacts for key industry suppliers and service providers

Active IQ

Tel: +44 (0)1480 467950
<https://activeiq.co.uk/>

Art of Cryo

Tel: +49 2935 9652 0
 Email: contact@artofcryo.com
www.artofcryo.com

Core Health & Fitness

Email: uksales@corehandf.com
<https://corehandf.com/>

Crown Sports Lockers

Tel: +44 (0)1803 555885
 Email: sales@crownsportlockers.co.uk
www.crownsportlockers.co.uk

EGYM UK Ltd

Tel: 07460 373317
 Email: contact.uk@egym.com
<https://egym.com/uk>

EMD UK

Tel: +44 (0)1403 266000
 Email: hello@emduk.org
www.emduk.org

énergie Fitness

Tel: 03330 151 865
 Email: franchise@energiecentral.com
www.energiefranchise.com

Everyone Active

Tel: 01455 890 508
 Email: pr@everyoneactive.com
<https://www.everyoneactive.com/>

FIBO Global Fitness

Tel: +49 211 901910
 Email: info@fibo.com
www.fibo.com

fibodo Limited

Tel: 0207 043 0043
 Email: enquiries@fibodo.com
www.fibodo.com

Fisikal Limited

Tel: +44 (0)7720285860
 Email: info@fisikal.co.uk
www.fisikal.com

Fitronics (CoursePro and TRP)

Tel: 03301280971
 Email: hello@fitronics.com
<https://www.fitronics.com/>

Freemotion Fitness

Tel: 1-877-363-8449
 Email: sales@freemotionfitness.com
www.freemotionfitness.com

FunXtion International BV

Tel: 0611329134
 Email: joyce@funxtion.com
www.funxtion.com

Gympass

<https://www.gympass.com/uk>

Global Wellness Summit

www.globalwellnesssummit.com

Himalayan source

Tel: +1 888 576 3525
www.himalayansource.com

Hussle

Tel: 020 8629 1778
 Email: info@hussle.com
www.hussle.com

InBody UK

Tel: 01530 569620
 Email: uk@inbody.com
<https://uk.inbody.com/>

Indigofitness Ltd

Tel: 01455 890 100
 Email: info@indigofitness.com
www.indigofitness.com

IONTO Health & Beauty GmbH

Tel: (0) 49 721 9770-828
 Email: export@ionto.de
www.ionto.de/en

Jordan Fitness

Tel: +44 (0)1553 763285
 Email: sales@jordanfitness.co.uk
www.jordanfitness.com

Keiser UK LTD

Tel: +44 (0) 1666 504710
 Email: sales@keiseruk.com
www.keiseruk.com

Legend Club Management Systems (UK) Ltd

Tel: 0800 031 7009 or
 +44 (0)1904 529 575
 Email: info@legendware.co.uk
www.legendware.co.uk

Leisure-Net

Email: info@leisure-net.org
www.leisure-net.org

Les Mills UK

Email: lmuk.clubs@lesmills.com
<https://www.lesmills.com/uk/>

Life Fitness

Tel: +44 (0) 1353 666017
 Email: life@lifefitness.com
www.lifefitness.co.uk

Magicline GmbH

Tel: +49 (0) 40 - 42 93 24 - 0
 Email: welcome@magicline.com
<https://www.magicline.com/en/>

Matrix Fitness

Tel: +44 (0) 1782 644900
 Email: info@matrixfitness.co.uk
<https://uk.matrixfitness.com/en>

Mediana Co., Ltd.

Tel: +82-(0)70-7092-9750
 Email: Jason.kim@mediana.co.kr
www.mediana.co.kr

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www.merrithew.com

Miha bodytec

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 Email: uk-info@miha-bodytec.com
www.miha-bodytec.com/en

Mindbody

Tel: +44 20 3514 1894
 Email: sales@mindbodyonline.com
www.mindbodyonline.com

Myzone

Tel: +44 (0)115 777 3333
 Email: jonathan.monks@myzone.org
www.myzone.org

Octane Fitness UK

Tel: 1.301.646.2801
 Email: mjjeffrey@truefitness.com
www.octanefitness.com

Orbit4

Tel: 07557 365669
Email: daniel@orbit4.org
<https://orbit4.org/>

Parkwood Leisure

Tel: +44 (0)1905 388500
<https://www.parkwoodleisure.co.uk>

Pendex Fisio S.L.

Tel: +34722 589009
Email: sales@pendexcompany.com
<http://www.endexcompany.com>

Perfect Gym Solutions S.A.

Tel: (+44) 203 699 99 98
Email: contact@perfectgym.com
www.perfectgym.com

Physical Company

Tel: 01494 769 222
Email: sales@physicalcompany.co.uk
www.physicalcompany.co.uk

Powerplate

Tel: 0207 317 5000
www.powerplate.co.uk

Precor

Tel: 01276404900
Email: precor.uk@precor.com
www.precor.com/en-gb/commercial

Premier Software Solutions Ltd

Tel: +44 (0)1543 466580
Email: communications@premiersoftware.co.uk
www.premiersoftware.co.uk

Proinsight Mystery Shopping

Tel: 0203 0954954
Email: info@proinsight.org
www.proinsight.org

Prospec

Tel: 01709 377 147
Email: sales@prospec.co.uk
www.prospec.co.uk

Pulse Fitness

Tel: 01260 294600
www.pulsefitness.com

Quoxx

Tel: +44 (0)1206 806 140
Email: contact@quoxx.com
<https://quoxx.com/>

Safe Space Lockers

Tel: 020 3651 1500
Email: info@safespacelockers.co.uk
<https://safespacelockers.co.uk/>

Saltability

Tel: +1 561 515 5142
www.saltability.com

ServiceSport (UK) Ltd

Tel: 01257 264 738
Email: info@servicesport.co.uk
www.servicesport.co.uk

Technogym

Tel: +44 (0)1344 300236
Email: UK_info@technogym.com
www.technogym.com

TRIB3 International Ltd

Email: franchise@trib3.co.uk
www.trib3.co.uk/franchise

TVS Group

Tel: +44 (0)1706 260 220
Email: Sales@TVS-Group.co.uk
www.TVS-Group.co.uk

Venueserve Fitness

Tel: +44 (0)207 112 8078
Email: sales@venueserve.com
<http://fitness.venueserve.com>

Xn Leisure Systems Ltd

Tel: 0345 512 0004
Email: info@xnleisure.com
www.xnleisure.com

Zimmer MedizinSysteme GmbH

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