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GYM ANALYSIS



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BACKGROUND

The health and fitness industry has undergone a seismic shift in recent years. The turn of the millennia birthed a dramatic uptake in exercise and gym participation. Going to the gym three times a week, while commonplace nowadays, would have been considered the sign of a fitness freak before 2000. Since 2008 the number of fitness facilities has increased by 112%, reflecting the massive increase in demand for membership. With the plethora of new technology that has complimented gym membership, there has been meteoric growth in demand for various classes and functional fitness attire. These new technologies combined with changing attitudes towards fitness has seen a period of continual growth for the health and fitness industry.

However, the thriving year on year growth of gym revenue has been severely altered by the advent of Covid. In pre-pandemic times, 20% of adults saw the gym as the primary way to stay fit, this dropped to 7% at the start of 2021. Lockdowns and the closure of gym facilities combined with the mistrust of indoor spaces has caused many to re-evaluate their perspective on gym membership.

This sea change in attitudes underlies the importance of understanding what is motivating current gym members. Knowing this will reveal insights about how to re-engage those that have switched the cross trainer for cross country. Metrix Data Science have applied their analytical tools to understand the key characteristics of those living within half a mile of the UK's biggest gyms. These include:

- Anytime fitness
- Bannatyne
- CrossFit
- David Lloyd
- Fitness First
- Nuffield
- Pure Gym
- The Gym
- Virgin Active

Due to the pandemic, now more than ever people are choosing to join local gyms. Therefore, an understanding of those living in close proximity to certain gyms gives a good indication of the profile of those gym members.



Vigor

To understand the key characteristics of those living close to the aforementioned gyms, MDS employed their health and fitness geo-demographic tool - Vigor Health. Vigor is the UK's first health and wellbeing segmentation tool providing unique insights into peoples' attitudes towards health and wellbeing. This tool was created using a clustering algorithm which combined large scale survey data and demographic information to create disparate segments of likeminded people. The algorithm assigned each UK postcode a segment, each segment having shared characteristics, producing 18 distinct health and wellbeing segments.

These segments range from the ultra-fit Wellbeing Warriors to those who are far less committed to a healthy lifestyle, namely Stuck in the Mud. The former segment has the highest wellbeing score. As part of Vigor, each segment is given a wellbeing score which incorporates several different health metrics across diet, activeness and health. Wellbeing Warriors have a very good diet and tend to exercise at least six times a week. This is a far cry from the Stuck in the Mud segment. Their health routine leaves much to be desired. The majority exercise either once a week or not at all. They are the least likely to eat new foods which will improve their diet. Asking respondents questions about their desire to change was a key part of this segmentation, Stuck in the Mud are the least likely segment to change their ways.

Vigor also focused on happiness metrics. This is encapsulated by groups like Mature and Merry. This segment is the second happiest group and have an older age profile than the others. They are active but far from gym freaks, with 75% of the segment stating walking as their favourite means of exercise. This compares starkly with Cheerless Carnivores whose happiness score is the lowest of all segments.



Methodology

To carry out this analysis MDS calculated the distance from each of the gyms to all UK postcodes. Then MDS took the postcodes which were within half a mile of each gym to create 9 separate but overlapping groups for further analysis. A tight proximity radius was chosen (half a mile) to prevent the profiles merely being reflective of the cities/towns in which the gyms are situated.

MDS ran Vigor profiles on each group to understand the attitudes towards health and wellbeing of the different groups. The analysis allowed these groups to be ranked by different attributes. For example, using Vigor an overall wellbeing score was calculated. Additionally, rankings by things like happiest group, most physically active group and most committed to improve their diet were generated.



Anytime Fitness

The largest and most over-represented group for those living near Anytime Fitness are the Fight Through Adversity segment. Despite having slightly below average metrics in terms of physical health, they tend to be very active with approximately a fifth exercising every day. They are also known to spend a fair bit on physical activity with many opting for gym memberships. Their health scores are held back by their proclivity for eating unhealthy foods, lack of fruit and veg, and their penchant for a drink.

They are the second most likely group, compared to groups living near the other gyms, to want to improve their health. As their segment name describes, they are striving towards improving their life. However, they score towards the bottom end in terms of wanting to improve their diet. So, it's a yes to the barbell but also yes to the bar.

Those living near Anytime Fitness are comparatively likely to spend a long time on their appearance and are the 3rd most physically active group. Despite being the second happiest group, narrowly losing out to those living near CrossFit, they mirror the UK average in terms of their likelihood to find themselves attractive.



Bannatyne

Households near Bannatyne were also over-represented by the Fight Through Adversity segment as well as Glum & Groomed. Glum & Groomed tend to get a good deal of exercise and feel content with their activity levels. They are into self-care and are very interested to try new skin care products. They score the lowest in terms of happiness metrics hence their gloomy disposition.

People living near Bannatyne are definitely into their fitness. They spend the most time engaged in physical activity, enjoying a wide variety of different sports including running and swimming. Despite all this activity, those living near Bannatyne are one of the most unhappy groups. They tend to spend quite a long time on their appearance and tend to shy away from a drink.

CrossFit

Those living near CrossFit fit a very distinct profile. There is a large over-representation of Hedged Hedonists. This Vigor segment is one of the healthiest groups and enjoy a very salubrious lifestyle and are the segment which spends the most money on physical activity. What differentiates themselves from other healthy groups like Wellbeing Warriors is their tendency to drink heavily on weekends. Likely partying in penthouses and exclusive clubs. They also eat quite poorly being the most avid consumers of ready meals of all Vigor segments.

Possibly as a result of their gym hard play hard lifestyle, those living near Crossfit gyms tend to enjoy their lives. They are the happiest group out of the lot. They are among the highest in terms of overall wellbeing and are one of the least likely groups to be overweight. In-keeping with their hedonistic principles, they are the second least likely group to want to improve their diet. They are content to consume high amounts of sugar and salt but make up for this on the peloton.



David Lloyd

People living near David Lloyd are over-represented by some of the healthiest Vigor segments. Those living near David Lloyd are the second most likely group to spend a lot on gym equipment. Tending to be time poor and very active these individuals are big consumers of health and fitness gadgets. They are also inclined to use new technologies to increase their motivation and commitment.

Compared to those living near CrossFit they are a more abstemious bunch, being the least likely group to drink and have the second-best diet out of all groups. Their good diet is a function of their willingness to attach significant value to health and nutrition, and tend to be experimental with food. They are big advocates of diets which phase out meat and are relatively inclined towards being pescatarian and consuming meat free burgers.

Fitness First

Households living within half a mile of Fitness First are more than twice as likely to belong to Wellbeing Warriors compared to the UK average. Wellbeing Warriors are the healthiest of all Vigor segments. Exercise is a massive part of their lives, and the majority are exercising either every day or three to six times a week. They are into self-care in a big way and are one of the most likely Vigor segments to spend more than £50 a week on body maintenance.

Those living close to Fitness First have the second highest wellbeing score which is just shy of those living near Virgin Active. They are also the second most likely group to consider themselves attractive. Despite this, they are the least likely group to spend time on their appearance.

Unsurprisingly, they are the least likely to have type 2 diabetes and are equally unlikely to be overweight. Despite their very good diet and appetite for exercise, they feel they can do more! They are the second most likely group to want to increase their amount of physical activity and the most likely group to want to improve their diet. In this sense they are the most aspirational group in terms of their relationship with wellbeing.



Nuffield Health

If you live within half a mile of Nuffield Health you are among a group which is over-represented by healthy Vigor Segments like Wellbeing Warriors similarly to those that live near Fitness First and Virgin Active.

The Nuffield Health group are very committed to the maintenance of their health and fitness evidenced by the fact they are the most likely to spend significant sums on gym equipment. They have strong ambitions, being one of the most likely groups to want to improve their overall health and to want to increase their amount of physical activity. This characteristic mirrors that of those living near Fitness First. Their ambitions regarding health and wellbeing are likely to be tied to their aspirations for their appearance. They are one of the most likely groups to consider themselves attractive.

They do not shy away from a drink, being one of the most likely groups to consume alcohol and are fairly low down in terms of their reliance on eating meat products.

Pure Gym

Those living near a Pure Gym are over indexed for Glum & Groomed, Fight Through Adversity and Held Back. The latter are a small Vigor segment that suffer from motivational obstacles to improving their health. They tend to state the vices of sugar and alcohol as key reasons that prevent them from having a healthier diet. Lack of motivation is likely to be a foremost obstacle.

Households living in a close proximity to Pure Gyms are the most non-descript group i.e., in terms of their relationship with health and fitness they most closely mirror the UK average. The main distinguishing feature of this group is their propensity to eat meat products. They are the second most likely group to do so. They are a fairly aspirational bunch in terms of their diet being one of the most likely groups to want to improve their nutrition.



The Gym

The profile of those living near to The Gym is fairly similar to those living near Pure Gym. The most represented Vigor segments are Glum & Groomed, Fight Through Adversity and Held Back as was the case with Pure Gym.

People living near The Gym are the biggest meat eaters compared to those living near other gyms. Their diet is meat heavy yet there is a good amount of nutritional variation since their overall diet scores highly. This group have a high happiness score making them the third most content group. Despite The Gym being known for its low-cost approach, those living in the nearby area are comparatively likely to spend significant sums on gym equipment to keep them health and active. Potentially due to the strenuous nature of their workouts, those living near The Gym report to have quite low levels of energy.



Virgin Active

Those living near Virgin Active score very highly in a variety of health metrics. They have the largest penetration of Wellbeing Warriors – the healthiest Vigor segment – compared to those living near alternative gyms. Additionally, this group are over-represented by Lacklustre Veggies. This segment has the best diet of all segments, they are socio-demographically similar to Hedged Hedonists and Wellbeing Warriors but are slightly less active and eat more fruit and veg. This segment is over-represented by vegetarians and pescatarians. Lacklustre Veggies do not just eschew meat, they are also disinclined to be into popular sports like football, rugby and cricket preferring things like swimming.

Those lucky enough to live within half a mile of Virgin Active have the highest wellbeing score compared to other gyms. They are one of the least likely to have type 2 diabetes. They are potentially the vainest of all groups being the most likely to find themselves attractive and have very high aspirations for their health and wellbeing. They top the charts for the biggest desire to increase their physical activity.

Gym Comparison Charts

These charts investigate the relationship between two wellbeing characteristics in a graphical format. MDS have used Vigor to rank all the groups living nearby different gyms by various attributes. MDS have picked graphical combinations of different attributes to tentatively suggest the existence of relationships between these attributes.



Relationship Between Attractiveness and Happiness

Happiness



Figure 1

Figure 1 is a graph that shows the ranking of how happy the people living nearby different gyms are and how attractive they consider themselves to be. This analysis suggests that being attractive does not necessarily translate into being happy. The opposite relationship is illustrated with the more attractive groups being less happy. For example, those living close to a CrossFit gym are very happy, yet do not consider themselves attractive.

Relationship Between Gym Equipment Spend and Wellbeing

Wellbeing Score



Figure 2

Figure 2 investigates the relationship between spending on gym equipment and overall wellbeing given by the wellbeing score. Those living near Virgin Active tend to enjoy a high wellbeing score whilst spending a good amount on equipment, but they seem to be the exception rather than the rule. The highest spenders on gym equipment, namely those living near The Gym, David Lloyd and Nuffield, have comparatively low wellbeing scores. This analysis suggests great health metrics do not necessarily require deep pockets.

Relationship Between Eating Meat and Being Overweight

Overweight



Figure 3

Figure 3 above shows the association between a meat heavy diet and likelihood of being overweight. It is glum reading for the carnivorous, as there is a clear positive correlation between meat eating and being overweight. Those living near gyms like Fitness First and Virgin Active tend to eat less meat and have low a incidence of overweight individuals.

Relationship Between Desire to Improve Diet and Wellbeing Score

Wellbeing Score



Figure 4

The relationship between the desire to improve diet and wellbeing score is illustrated in Figure 4. The graph indicates that a want to improve diet is associated with higher overall wellbeing scores. Those living within half a mile of Virgin Active and Fitness First have very high wellbeing scores and state a strong desire to want to improve their diet. Those living near CrossFit are outliers since they have a high wellbeing score but a low propensity to want to improve their diet.

Relationship Between Spending Time on Appearance and Attractiveness

Attractiveness



Figure 5

You would be forgiven for thinking the longer you spend on your appearance the more attractive you consider yourself. MDS profiling analysis would suggest otherwise. Figure 5 posits a negative association between how long is spent on appearance and how attractive individuals consider themselves. Whilst those living near Virgin Active and Fitness First consider themselves very attractive, they are one of the least likely groups to spend a long time on their appearance. Households living near David Lloyd stand out as very unlikely to consider themselves attractive despite spending a lot of time in front of the mirror.



Summary

The gym space is very dynamic and fast-moving industry. The trends that been organically growing have been somewhat halted by the pandemic. However, as restrictions are further eased and life gradually returns to normal, the likelihood is that many will return to old habits. Whatever the landscape, it has become more critical than ever for gym operators to understand their target market and have deep insight about their customers' relationship with health and fitness.

Vigor is the UK's only geo-demographic segmentation system that solely focuses on health and wellbeing. This tool can be used to dissect and understand groups of people in terms of their motivations and inclinations regarding health and fitness.