

# MARKETING FOR THE HEALTH AND FITNESS INDUSTRY

TECHNOLOGY, STRATEGY AND VALUE



EDITED BY

NICOLA WILLIAMS-BURNETT  
HANNAH R. MARRIOTT

# **Marketing for the Health and Fitness Industry**

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# Marketing for the Health and Fitness Industry: Technology, Strategy and Value

EDITED BY

**NICOLA WILLIAMS-BURNETT**

*Cardiff Metropolitan University, UK*

and

**HANNAH R. MARRIOTT**

*Cardiff University, UK*



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INVESTOR IN PEOPLE

*I would like to dedicate this book to my co-editor, Hannah; without her, this book would not have been completed. Thank you, your expertise, drive, passion and ability to pick the best coffee shops for writing sessions are second to none.*

*My parents for always standing next to me.*

*Finally, Dr Heather Skinner for seeing things when I did not, you are truly missed.*

—Nicola Williams-Burnet

*I would like to dedicate this book to my co-editor, Nicola; without her, this book would not have been possible. Her dedication, effort and creative vision have been essential to the development of this book. It has been such a joy to work alongside her to make this book a reality.*

—Hannah R. Marriott

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## About the Editors

**Nicola Williams-Burnett** is currently a Senior Lecturer in Sport Marketing and Media in the School of Sport, Cardiff Metropolitan University, and has a PhD in social marketing and behaviour. Her research interests and publications are in social marketing, change behaviour, the health and fitness industry, physical activity participation and place marketing. Alongside her position in Cardiff Metropolitan University, she has been a health and fitness instructor for over 25 years where research meets theory.

**Hannah R. Marriott** is a Lecturer in Marketing & Strategy at Cardiff University Business School, UK. Her research specialises in digital consumer psychology and digital marketing strategies. Her recent publications have been in the areas of consumers' use and responses to emerging AI technologies, such as voice assistants, AI-based friendship apps and augmented reality.

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## About the Contributors

**Paula Kearns** subject specialism is sports marketing; her doctoral thesis was '*On Your Marks, Get Set, Go!* The Development of the Sport and Physical Activity Value (S&PAVAL) Model for use in the Leisure Industry'. In addition, her marketing credentials also include a MA Marketing and the CIM professional and post-graduate qualifications; she is also a Fellow of the Chartered Institute of Marketing (FCIM). Prior to entering HE, she worked as a Manager in the Leisure Industry for more than 20 years, working in both the public, private and trust sectors. She is, therefore, able to offer a skill-set that combines academic excellence with industry experience.

**Catherine Tryfona** is Associate Dean Partnerships in Cardiff School of Technologies at Cardiff Metropolitan University. She has research interests in mobile technology use, particularly for autistic users. She also has an interest in how mobile technology can widen participation in a wide range of settings, including education, healthcare and fitness. She oversees technology-based education in a number of different international settings, including Sri Lanka, Oman, Greece, Bulgaria and Morocco.

**Vera Pedragosa** is an Associate Professor at Universidade Autonoma de Lisboa and has a PhD in sports sciences. She is a Member of CICEE – Centre for Research in Social and Business Sciences and the Centre for Research in Psychology. She is the Author of several academic articles, book chapters and books on fitness, sport management and marketing. Her work has been presented at several national and international conferences.

**Vítor Sobral** is an Auxiliary Professor at the University of Maia. His research is focused on sport marketing, sport event leveraging and how sport participation can be used to achieve health benefits. His research has been published in highly ranked international journals, including *Tourism Management*, *European Sport Management Quarterly*, *Journal of Sport Management* and *Sport Management Review*. He has also presented his research at sport management conferences in Europe, the United States, Australia and New Zealand.

**Celina Gonçalves** is an Associate Professor at the University of Maia, where she is Coordinator of the Sport Management programme. She is a Member of CIDES

and has PhD in in Sport Management, Master's in Management of Sports Organizations and Master's in psychology Issues. She is the author of several academic articles and book chapters on sport management, fitness and marketing. Her work has been presented at several national and international conferences.

**Steve Osborne** is a CIMSPA Chartered Fellow and Principal Lecturer in professional and workforce development the field of sport and physical activity. Steve works to bridge the gap between academia and practice, drawing on almost 30 years of experience working and volunteering in frontline and leadership roles in the sport and physical activity industry. Steve has prioritised his work to focus on strategic workforce planning initiatives, working closely with national and international industry and academic agencies as the Vice-Chairperson of the UK Professional Development Board (UKPDB), the Chairperson of the newly formed Sport and Physical Activity Workforce Observatory and Chairperson on the European Association of Sport Management (EASM) special interest group for employability and entrepreneurship.

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—Nicola Williams-Burnet

I would like to acknowledge my dear colleague, Dr Jason Broom at Ulster University, for his efforts in reviewing two chapters for this book. His expertise in social media and digital technologies were invaluable to the review and further development of those chapters.

—Hannah R. Marriott

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# Chapter 1

## Introduction

*Nicola Williams-Burnett*

*Cardiff Metropolitan University, UK*

### 1. Introduction

This chapter introduces the world of health and fitness, a dynamic billion dollar global industry that has been around for many more years than people realise. It introduces the history of the industry, the value and consumption of health and fitness, defines physical activity with discussion on the role of physical activity in society, and finally an understanding of what marketing and sport marketing is. The aim of this chapter is to give a broad understanding of the different components within the health and fitness industry which link to subsequent chapters in the book.

The health and fitness market is valuable industry across the world; in the United Kingdom, 34,394 people work within the sector, and at the time of writing this chapter, the Gym and Fitness industry was predicted to have an annual revenue of £1.9bn in 2024 ([IBIS World, 2023](#)).

### 2. Health and Fitness Industry

Compared to many other sectors, the health and fitness industry is relatively new, but, participating in physical activity is not a new modern day creation. History can trace back the roots to participation in structured exercise all the way back to Egypt around 2,000 BC (approximately 4,000 years ago); the Egyptians recognised the importance and benefits of physical activity and introduced bodyweight callisthenics ([Tharrett, 2022](#)). It was not just the Egyptians who understood the power of physical activity; in ancient Greece, the birth place of the Olympics, people also took part in structured exercise to achieve an end goal of fitness ([Wuest & Bucher, 1995](#)), a focus on physical well-being and healthy lifestyle ([MacAuley, 1994](#)). Over the centuries, health and fitness has moved with the times and latest thoughts on how individuals should participate in physical activity. In the 1800s, a number of gyms began opening across the world in a format that is familiar and are still current today's modern health and fitness setting, the private members

only gym. This format introduced equipment which many of us would recognise and still use in our workout, such as benches, weights, dumbbells, boxing, ropes, and ladders (Tharrett, 2022).

The Young Men's Christian Association, or as we know today, the YMCA opened a bible study group for men in London in 1844, the YMCA's ethos was based on nurturing individual's 'body, mind and spirit' (YMCA, n.d.). Within a few years, the YMCA had spread across the world to places like America and Canada. In 1879, a YMCA in America opened the first gym, and by 1881, the British YMCA incorporates personal fitness within the structure of the YMCA (YMCA, n.d.). You could almost say that this was the first global health and fitness chain.

This is just the tiniest of snippets of the industry's history, and we could easily write 100 books documenting the journey of health and fitness. What this brief introduction highlights that the foundations of this industry spans thousands of years and is deeply ingrained into our lives.

### **2.1. *The First Fitness Boom***

Health and fitness encountered a number of contributing factors that shaped the industry to what we recognise today; this next section discusses those key elements. During the 1970s and 1980s, the first noted fitness boom began across the world and created the commercialisation of health and fitness into what we see today. A number of these key influences were lifestyle, popular culture, the jogging craze, aerobics, gyms/health clubs, and popular culture.

### **2.2. *Lifestyle and Popular Culture***

After the Second World War, job roles were becoming less physically demanding as more sedentary jobs were the norm (Kreiter, 1978, cited from Stern, 2008); consequently, people had to incorporate physical activity within other areas of the life such as leisure time and active travel in conjunction with a change in employment; during the 1970s and 1980s time, there was a growing interest in 'self-improvement' for health, to better one's self, a focus on beauty and being slim is healthy (Poorani, 2012). Individuals saw getting in shape through participating in physical activity as a way to be seen, to be socially acceptable, a way to demonstrate affluence (Crawford, 2006) and validating yourself (Diamond, n.d.; cited Stern, 2008). In the media, songs and films were also embracing the health and fitness boom; for example, in 1981, Olivia Newton John released the world wide hit 'Let's get physical' (IMDb, 2022a), 'Flashdance' the film was released in cinemas (IMDb, 2022b).

### **2.3. *Jogging Craze***

Even up until the late 1960s, people who went jogging were considered odd, so much so if a man was seen jogging they were considered suspicious, especially if they ran at night (Edwards, 2015). Perceptions began to slowly change when Bill

Bowerman (co-founder of Nike) and W. E. Harris wrote a book titled 'Jogging: a physical fitness programme for all ages' (Bowerman & Harris, 1971). Athletes were becoming celebrities not just on the track but off the track in popular culture. It was not until the early 1970s when jogging was considered more acceptable, more people were jogging for exercise and enjoyment, road races began appearing, with a shift in focus to participation and not on winning (Robinson, 2011).

#### **2.4. Aerobics**

Traditionally, people exercised using instructional books, records, or went to fitness studios, but the notion of group exercise, choreographed to music was still in its infancy. By the end of the 1970s, this was all changing, Jazzercise classes were gaining in popularity, aerobics was introduced into studios, by the early 1980s aerobics were mainstream across the globe, a time of leg warmers, sweatbands, and Lycra, group exercise was now mainstream, and studios were packed out. Around this time, video cassette recorders (VCR) were becoming more affordable to the general public and approximately 20% of UK households owned a VCR in 1983 (BBC News, 2005). This offered individuals a new way to consume exercise, it was more accessible, cheaper than going to classes every week, and they could take part in their homes as if they were in a class. On 24th April 1982 (History Editors, 2021), Jane Fonda released the first exercise video called 'Jane Fonda's Workout'. The workout video went on to be the most successful exercise video selling more than 17m copies (Garcia, 2018). The fitness video market was born and so too were fitness stars.

#### **2.5. Gyms/Health Clubs**

The image of the traditional gym was male dominated, located in dusty halls or basements, places that focused on physical fitness, places like the YMCA. Post war, 1947, in America, brothers Vic Tranny and Armand opened what is considered today to be the format for today's health club (Buck, 1999). The brothers created a space that moved away from the traditional image to one where the facilities were considered opulent, offering a range of activities and a variety of workouts that altered throughout the week, likened to a class timetable. Not only had the style, product offering, and activities changed, but the brothers created a space for both men and women, not only a place to participate in physical activity but also a place where people could socialise, make new friends, and relax (Buck, 1999; Tharrett, 2022). This concept is considered the first blueprint for the health and fitness clubs we see today not only for the facilities offered but also how the business was run in relation to membership sales (Buck, 1999; Tharrett, 2022).

#### **2.6. Today's Industry**

Like many other industries, the health and fitness industry has had to alter and move with the rapid changes in technology although changes are slow (IBIS World, 2023). It has evolved from the mass consumption, one size fits all approach

(although elements of delivery of health and fitness has its roots in mass consumption) to a more customised, on demand, to suit the varying needs of the participant. The second boom in the health and fitness industry is perceived to be more 'sophisticated' than the first. This is due to the increased interconnectivity between the participant and the delivery of physical activity not only in the health clubs and gyms but in the home too (Millington, 2016).

As well as the natural progression of the industry (time, technology, trends, and tastes), another contributing factor altered and shaped how fitness was delivered and consumed.

In the United Kingdom, Friday 20th March 2020, the government closed the health and fitness industry over night. The COVID pandemic physically stopped the world and many industries, not just health and fitness, businesses either had to adapt or cease to exist. As a fitness instructor, I vividly remember this as I was teaching on the Thursday morning and suddenly my Friday morning class was cancelled, all my classes were cancelled for the foreseeable future. Even though the pandemic closed the facilities, it also accelerated the growth in many areas of the delivery and consumption of physical activity and how we exercised in the home through alternative sources such as the internet to participate increased dramatically. Individuals could participate and interact in real-time classes (Peloton), streamed classes (Les Mills+), and health and fitness apps (Joe Wicks, Davina McCall) to name a few. This offered the participant more choice, more flexibility, customisation and reduced the perishability of physical activity as consumers could participate in real time, save and participate time and time again. Never before has the individual had so much information, choice, and opportunity to exercise (although not always reliable and safe).

Each chapter will identify and discuss these advancements that have changed our industry, including:

- *The health and fitness consumer*: understanding the consumer is a key to determining motivation, barriers, what makes them want to participate
- *Value in consumption*: what does the participant value when consuming physical activity
- *Fitness technology*: what is happening in the industry in relation to gym equipment and wearable tech
- *Social media*: understanding the theories behind social media and influencers
- *Hard to reach demographics*: How to understand different demographics, how to remove barriers and increase motivation

### **3. The Health and Fitness Market**

The health and fitness market is not only made up of the traditional gym and private health club, there are a number of different product offering and health and fitness setting within this industry. It is to be noted that data tend to focus on either the private sector (key industry players, health clubs, gyms) or public leisure centres and swimming pools and to get a complete understanding of this sector

is fragmented. This fragmentation is due to the different approaches in research (what is included or not) the variety of settings, and who runs and owns the settings (private, government). The sector is made up of so much more, listed below is a list of different settings, although this is not exhaustive.

### 3.1. Settings of Health and Fitness

*Gym:* Traditionally associated with weights, weightlifting, cardio machines (treadmills).

*Health club:* Tend to have the same equipment as a gym but will also offer group exercise, have more personal trainers (PTs), possibly tennis and squash courts, other amenities pool, sauna, steam, children's clubs, restaurants. Even in this sector, there is differences, there is the growing low-cost, budget gym Puregym, Energie Fitness, to the luxury David Lloyds.

*Boutique studio:* A small gym, generally focusing on a specific type of exercise. Boutique gyms have highly specialised and trained instructors, for example Crossfit, Yoga, Pilates, and women only gyms.

*Local government run leisure:* Run by the local authority dependent on facility will depend on services delivered. Most will have a weights section, cardio machines, group exercise, local groups may use facilities too, that is taekwondo, dance schools.

*Outdoor fitness:* is exercise outside. Not set in one location, this can be in a forest, park, field, anywhere as long as it is outdoors. Type of activity can include parkour, park run, Military fitness and bootcamps, this is where The Body Coach Joe Wicks started ([The Body Coach, 2022](#)).

*Home:* exercise in the home has transitioned from video tapes and DVD's to individuals downloading fitness Apps. There are a range of different types of fitness apps, from tracking physical activity (Strava, running, cycling, etc.), exercise programmes, either general (NikeNTC, Les Mills+). Streaming is also popular were participants can join in live classes around the world (Peleton, local community fitness instructors through Zoom). Working out in the home has altered dramatically through technology and as a result of the pandemic.

### 3.2. Market Size and Value

As stated at the start of this chapter, at the time of writing this chapter, the Gym and Fitness industry was predicted to have an annual revenue of £1.9bn in 2024 ([IBIS World, 2023](#)). Research is predicting that the industry will carry on growing even though the UK is going through a cost-of-living crisis and recovering from restrictions of COVID ([IBIS World, 2023](#); [Leisure DB, 2023](#)).

Time and market value is divided into two segments, a world pre-COVID and post-COVID. Pre-COVID, the health and fitness club market had enjoyed considerable growth year on year, as you can see in [Fig. 1.1](#), in 2019, the market was valued at £3,367m, with the expectation of continued growth £3,779m by 2024 ([Intel, 2019](#)), with the revenue from the fitness market was €5,510m (Statista, 2021). This growth was fuelled by the expansion of the low-cost gym

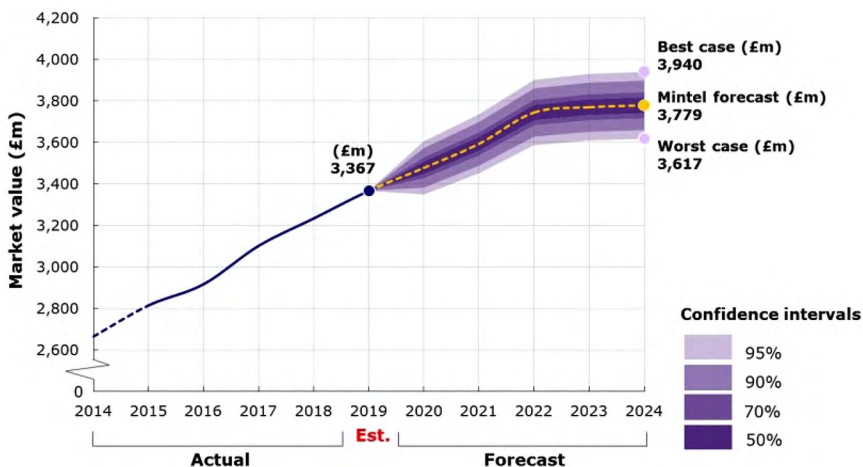


Fig. 1.1. Market Forecast for Private Health and Fitness Clubs, 2014–2024 (Pre-COVID forecast; [Mintel, 2019](#)).

market which has seen the introduction of new competitors within the market and they have opened more facilities across various locations around the UK than any other competitor, making accessibility and participation much easier for individuals.

From March to July 2020, the industry virtually ground to a halt with COVID restrictions forcing facilities to close due to government restrictions, overnight the industry as we knew it was gone and in hindsight it would never be the same again. Towards the end of July 2020, the government reviewed restrictions and allowed gyms, pools, and health clubs to reopen with strict guidelines on capacity and operational processes (Gov.uk, 2020). The industry was open, but still very controlled.

### 3.3. Mobile Phone Applications

Not only was exercise equipment experiencing growth, so too were smartphone applications (Apps). Health and fitness apps serve many different areas within the health and fitness industry, from the traditional physical activity apps (HIIT, strength, yoga, to name a few), to meditation, wellness, and health tracking app. For the consumer, they are versatile and offer choice and convenience; for the provider, it is a way to connect with consumers on a personal level, introduce another channel of distribution and consumption, increase customer engagement, and build relationships.

Since COVID, consumer spending has increased dramatically as individuals turn to apps to participate as traditional health and fitness settings were closed. During the first year of lockdown health and fitness app, downloads increased from 446m in 2019 to 656m in the same period in 2020 ([Statista, 2021b](#)). As seen in [Fig. 1.2](#), the number of downloads increased in the first quarter of 2020; when COVID restrictions were introduced, downloads continued to rise until the fourth quarter leading up till Christmas, a time where participation levels usually

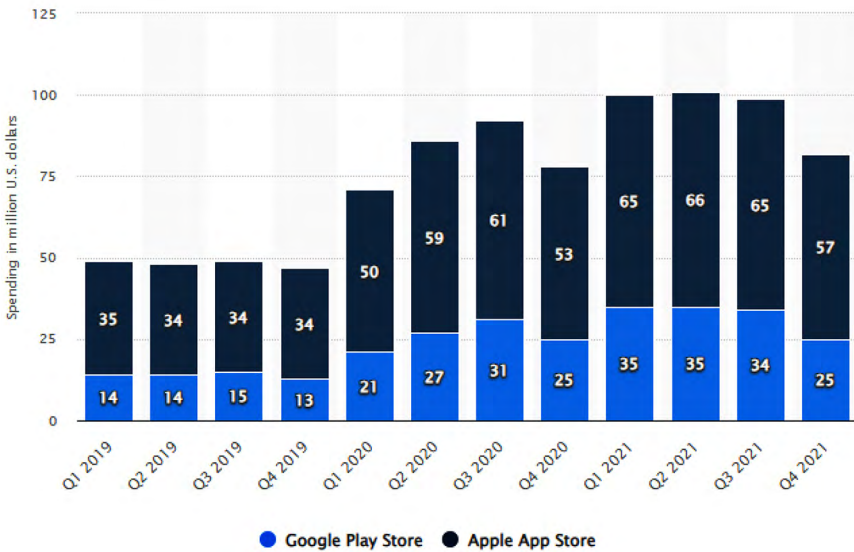


Fig. 1.2. Consumer Spending on Health and Fitness Mobile Apps in Europe from the 1st Quarter 2019 to 4th Quarter 2021 (Statista, 2022).

fall. In 2021, downloads surpassed 2020, with a spike when the second lockdown was enforced and January, traditionally a time when individuals begin their health kicks. Consuming physical activity through mobile applications is showing no sign of slowing, to quantify this, 16.28m apps were downloaded in January 2020, in January 2022 this has risen to 20.92m.

Even with all the technology available and equipment bought, individuals stated that home workouts were not as challenging as in the health and fitness setting, not as good, or were not intense enough (Falardeau et al., 2021; Ihrsa, 2020). Additionally, individuals noted that they were less consistent participating in exercise (Ihrsa, 2020). During the pandemic, activity levels declined and inactivity levels increased as people failed to meet the recommended activity levels of 150 minutes per week, with those who are less likely to participate in physical activity participating even less (Sport England, 2022). As an exercise provider, this presents a positive and a challenge. The positive, it demonstrates the benefit of being within a health and fitness setting with likeminded individuals, the ‘in person’ experience and tangibility of this. The challenge is how can industry first cater to individual needs and offer a tailored experience, like apps, and how can they deliver their product offering into the home setting more successfully.

### 3.4. The Impact of COVID

During COVID, the UK Government closed gyms, health clubs, and leisure facilities on and off for a period of 18 months. When these facilities were allowed back open, there were strict guidelines in place, limiting class sizes, number of individuals

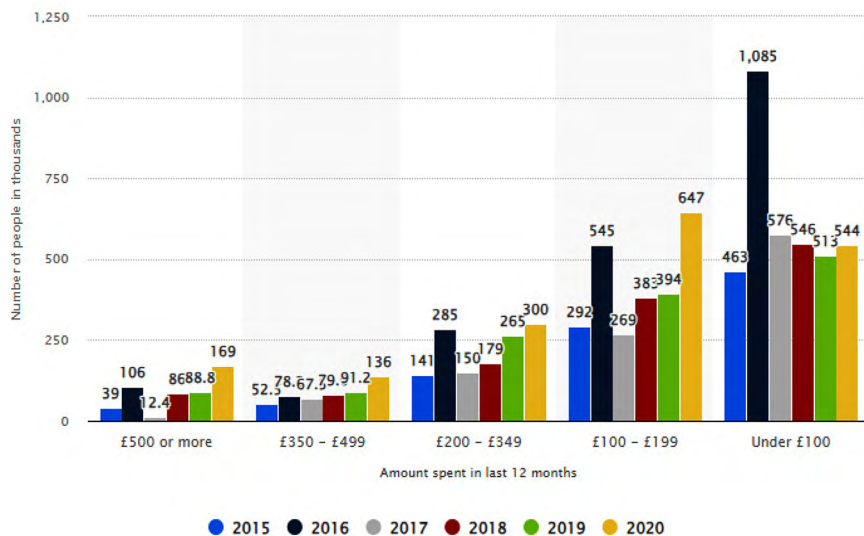


Fig. 1.3. Number of People Purchasing Exercise Equipment in Great Britain from 2015 to 2020, by Expenditure (Statista, 2023).

in gyms, and/or using the facilities (Westbrook & Dickinson, 2021) meaning that people could not always participate at their club as there was no space for them.

With the closures and restrictions, individual’s exercise habits changed, people started to go out for more walks, jog, cycle, or exercise within the home, people’s attitude to participating in physical activity was changing and they were appreciated participating in physical activity (Sport England, 2020). Not only was there a change in how and where we exercised, but there was shift in focus of why we exercised. Individuals stated they were no longer just exercising for weight management or to be fit, now people were participating in exercise as a way to maintain mental health, relieve stress, and prioritising wellness (Falardeau et al., 2021; Sport England, 2020).

People were spending more money to be able to participate in psychical activity within their home. The exercise equipment market has had steady growth and how much people are spending has also increased as consumers are buying higher priced equipment than in previous years (Fig. 1.3). Equipment priced £350–£499, £500+ saw the biggest increase, examples being exercise bikes, treadmills, and cross trainers to create the ‘home gym’ experience.

### 3.5. Post COVID Market Value

The year 2020 saw the health and fitness club sector take a 50% decline in revenue; currently, it is valued at £3,098m, still well below pre-COVID figures (Intel, 2022). Post-COVID, in 2022, the industry has not recovered back to pre-COVID revenue (IBIS World, 2023), industry reports identify that the market