



GapMaps

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2022 Mid-Year Network Report

Health & Fitness Centres

1st July 2021 – 30th June 2022
Australia



Introduction

We are pleased to share our 2022 Mid-Year Network Report for Australia's Health & Fitness Sector. This report provides you with unique insights and key trends into the changing competitor landscape we've observed in this sector as at 30 June, 2022.

Our data represents the most up-to-date view of physical network locations in Australia. Our aim is to empower you with the insights you need to make better location decisions, faster. GapMaps is a leading provider of location intelligence services in Australia, Middle East and Asia. We provide our clients with the tools necessary to develop and refine their network strategies and make fact-based assessments regarding network growth opportunities.

NETWORK SUMMARY

30 June 2022

22 Brands Tracked

3,424 Locations

159 Stores Opened*

49 Stores Closed*

	Total Stores	Last 12 Months			Last 3 Months		
		Openings	Closures	Net Change	Openings	Closures	Net Change
F45 Training	554	8	1	+7	1	1	-
Anytime Fitness	550	25	5	+20	7	-	+7
CrossFit	509	-	-	-	-	-	-
Snap Fitness	242	13	2	+11	2	-	+2
Plus Fitness AU	207	5	2	+3	4	1	+3
Body Fit Training Australia	188	38	-	+38	3	-	+3
Jetts Fitness	167	3	11	-8	-	-	-
Physioiq	116	-	-	-	-	-	-
Goodlife Health Clubs	96	3	2	+1	-	2	-2
KX Pilates	90	13	1	+12	2	-	+2
UBX	84	4	1	+3	-	-	-
Club Lime Group	81	-	-	-	-	-	-
Fitstop Australia	73	24	-	+24	5	-	+5
Femwood Fitness	72	4	1	+3	2	1	+1
Studio Pilates	66	15	1	+14	3	-	+3
Fitness First	63	-	1	-1	-	-	-
Curves	59	-	9	-9	-	-	-
Zap Fitness	56	1	-	+1	-	-	-
Vision PT	50	1	2	-1	-	2	-2
EFM Health Clubs	46	-	4	-4	-	-	-
Genesis Fitness New	38	2	3	-1	1	1	-
9 rounds	17	-	3	-3	-	-	-
Total (22 Brands)	3,424	159	49	+110	30	8	+22

*12 months to 30 June 2022

STORE COUNT BY CITY

30 June 2022

		No. Cities	Population (Mil.)	F45 Training	Anytime Fitness	CrossFit	Snap Fitness	Plus Fitness AU	Body Fit Training Australia	Jets Fitness	Physioiq	Goodlife Health Clubs	KX Pilates	UBX	Club Lime Group	Fistop Australia	Fernwood Fitness	Studio Pilates	Fitness First	Curves	Zapp Fitness	Vision PT	EFM Health Clubs	Genesis Fitness New	9 rounds
Australia		126	25.7	554	550	509	242	207	188	167	116	96	90	84	81	73	72	66	63	59	56	50	46	38	17
Tier 1	> 1 Million	5	16.6	410	391	284	168	178	145	121	68	85	79	57	30	50	53	47	58	28	32	46	41	19	17
	Greater Sydney	1	5.4	146	161	91	36	127	24	10	32	-	24	12	12	1	16	10	40	10	-	38	2	1	2
	Greater Melbourne	1	5.1	110	103	77	42	7	78	42	17	27	34	24	6	8	21	1	12	12	13	7	9	10	8
	Greater Brisbane	1	2.6	67	53	61	52	9	17	36	6	30	2	30	12	39	11	25	6	1	-	1	1	3	3
	Greater Perth	1	2.1	59	33	37	32	30	10	33	9	15	7	4	-	2	2	3	-	3	-	-	-	5	4
	Greater Adelaide	1	1.4	28	41	18	6	5	16	-	4	13	12	-	-	-	3	8	-	2	19	-	29	-	-
Tier 2	200,000-1 Mil.	6	2.2	54	53	65	23	14	18	28	15	9	8	19	32	14	10	15	5	12	17	4	2	4	-
	Gold Coast	1	0.6	18	9	16	11	3	9	15	2	7	1	7	-	8	1	8	2	1	-	2	-	-	-
	Australian Capital Territory	1	0.4	9	14	11	3	1	-	-	1	-	2	1	28	-	5	3	3	3	-	-	-	-	-
	Newcastle	1	0.3	8	9	14	2	3	1	1	4	-	1	5	-	-	-	-	-	5	-	-	-	3	-
	Wollongong	1	0.3	6	11	4	1	6	1	2	1	-	1	-	3	-	2	-	-	3	-	2	-	1	-
	Sunshine Coast	1	0.3	8	5	16	6	1	4	10	-	2	1	6	1	5	1	2	-	-	-	-	2	-	-
	Greater Hobart	1	0.2	5	5	4	-	-	3	-	7	-	2	-	-	1	1	2	-	-	17	-	-	-	-
Tier 3*	100-200,000	7	1.0	19	18	30	14	1	7	6	9	1	2	2	1	3	5	3	-	-	1	-	2	7	-
	Townsville	1	0.2	4	3	7	3	1	-	1	-	-	1	1	-	1	-	1	-	-	-	-	-	1	-
	Geelong	1	0.2	3	5	5	1	-	3	2	2	-	1	-	1	-	1	-	-	-	1	-	-	-	-
	Cairns	1	0.2	5	4	6	-	-	-	-	1	-	-	2	-	-	-	1	-	-	-	-	1	5	-
	Greater Darwin	1	0.1	3	1	4	6	-	1	-	6	-	-	-	-	-	1	-	-	-	-	-	-	-	-
	Ballarat	1	0.1	1	2	3	1	-	2	1	-	-	-	-	-	-	1	-	-	-	-	-	-	1	-
	Toowoomba	1	0.1	2	1	2	1	-	-	2	-	1	-	1	-	2	1	1	-	-	-	-	1	-	-
Tier 4	50-100,000	11	0.7	16	13	23	9	2	4	2	3	1	-	4	6	4	1	-	-	2	4	-	1	4	-
Tier 5	20-50,000	38	1.1	31	34	42	15	5	10	7	7	-	1	2	11	1	2	-	-	7	2	-	-	4	-
Tier 6	10-20,000	59	0.8	18	27	32	10	3	2	3	3	-	-	-	-	-	-	-	-	5	-	-	-	-	-
Other	n.a.	3.3		6	14	33	3	4	2	-	11	-	-	-	1	1	1	1	-	5	-	-	-	-	-

STORES PER MILLION RESIDENTS BY CITY

30 June 2022

		No. Cities	Population (Mil.)	F45 Training	Anytime Fitness	CrossFit	Snap Fitness	Plus Fitness AU	Body Fit Training Australia	Jetts Fitness	Physioiq	Goodlife Health Clubs	KX Pilates	UBX	Club Line Group	Fistop Australia	Fernwood Fitness	Studio Pilates	Fitness First	Curves	Zap Fitness	Vision PT	EFM Health Clubs	Genesis Fitness New	9 rounds
Australia		126	25.7	21.5	21.4	19.8	9.4	8.0	7.3	6.5	4.5	3.7	3.5	3.3	3.1	2.8	2.8	2.6	2.4	2.3	2.2	1.9	1.8	1.5	0.7
Tier 1	> 1 Million	5	16.6	24.8	23.6	17.1	10.1	10.7	8.8	7.3	4.1	5.1	4.8	3.4	1.8	3.0	3.2	2.8	3.5	1.7	1.9	2.8	2.5	1.1	1.0
	Greater Sydney	1	5.4	27.2	30.0	17.0	6.7	23.7	4.5	1.9	6.0	-	4.5	2.2	2.2	0.2	3.0	1.9	7.5	1.9	-	7.1	0.4	0.2	0.4
	Greater Melbourne	1	5.1	21.6	20.2	15.1	8.2	1.4	15.3	8.2	3.3	5.3	6.7	4.7	1.2	1.6	4.1	0.2	2.4	2.4	2.6	1.4	1.8	2.0	1.6
	Greater Brisbane	1	2.6	25.9	20.5	23.6	20.1	3.5	6.6	13.9	2.3	11.6	0.8	11.6	4.6	15.1	4.3	9.7	2.3	0.4	-	0.4	0.4	1.2	1.2
	Greater Perth	1	2.1	27.5	15.4	17.3	14.9	14.0	4.7	15.4	4.2	7.0	3.3	1.9	-	0.9	0.9	1.4	-	1.4	-	-	-	2.3	1.9
	Greater Adelaide	1	1.4	20.3	29.7	13.1	4.4	3.6	11.6	-	2.9	9.4	8.7	-	-	-	2.2	5.8	-	1.5	13.8	-	21.0	-	-
Tier 2	200,000-1 Mil.	6	2.2	24.8	24.3	29.8	10.5	6.4	8.3	12.8	6.9	4.1	3.7	8.7	14.7	6.4	4.6	6.9	2.3	5.5	7.8	1.8	0.9	1.8	-
	Gold Coast	1	0.6	29.1	14.6	25.9	17.8	4.9	14.6	24.3	3.2	11.3	1.6	11.3	-	12.9	1.6	12.9	3.2	1.6	-	3.2	-	-	-
	Australian Capital Territory	1	0.4	20.9	32.4	25.5	7.0	2.3	-	-	2.3	-	4.6	2.3	64.9	-	11.6	7.0	7.0	7.0	-	-	-	-	-
	Newcastle	1	0.3	23.4	26.3	40.9	5.8	8.8	2.9	2.9	11.7	-	2.9	14.6	-	-	-	-	-	14.6	-	-	-	8.8	-
	Wollongong	1	0.3	21.2	38.9	14.2	3.5	21.2	3.5	7.1	3.5	-	3.5	-	10.6	-	7.1	-	-	10.6	-	7.1	-	3.5	-
	Sunshine Coast	1	0.3	29.8	18.6	59.6	22.4	3.7	14.9	37.3	-	7.5	3.7	22.4	3.7	18.6	3.7	7.5	-	-	-	-	7.5	-	-
	Greater Hobart	1	0.2	21.0	21.0	16.8	-	-	12.6	-	29.4	-	8.4	-	-	4.2	4.2	8.4	-	-	71.3	-	-	-	-
Tier 3*	100-200,000	7	1.0	19.8	18.7	31.2	14.6	1.0	7.3	6.2	9.4	1.0	2.1	2.1	1.0	3.1	5.2	3.1	-	-	1.0	-	2.1	7.3	-
	Townsville	1	0.2	22.6	16.9	39.5	16.9	5.6	-	5.6	-	-	5.6	5.6	-	5.6	-	5.6	-	-	-	-	-	5.6	-
	Geelong	1	0.2	18.1	30.2	30.2	6.0	-	18.1	12.1	12.1	-	6.0	-	6.0	-	6.0	-	-	-	6.0	-	-	-	-
	Cairns	1	0.2	32.2	25.7	38.6	-	-	-	-	6.4	-	-	12.9	-	-	-	6.4	-	-	-	-	6.4	32.2	-
	Greater Darwin	1	0.1	20.4	6.8	27.2	40.8	-	6.8	-	40.8	-	-	-	-	-	6.8	-	-	-	-	-	-	-	-
	Ballarat	1	0.1	9.2	18.5	27.7	9.2	-	18.5	9.2	-	-	-	-	-	-	9.2	-	-	-	-	-	-	9.2	-
	Toowoomba	1	0.1	18.9	9.5	18.9	9.5	-	-	18.9	-	9.5	-	9.5	-	18.9	9.5	9.5	-	-	-	-	9.5	-	-
Tier 4	50-100,000	11	0.7	22.2	18.1	31.9	12.5	2.8	5.6	2.8	4.2	1.4	-	5.6	8.3	5.6	1.4	-	-	2.8	5.6	-	1.4	5.6	-
Tier 5	20-50,000	38	1.1	27.5	30.1	37.2	13.3	4.4	8.9	6.2	6.2	-	0.9	1.8	9.7	0.9	1.8	-	-	6.2	1.8	-	-	3.5	-
Tier 6	10-20,000	59	0.8	21.5	32.2	38.2	11.9	3.6	2.4	3.6	3.6	-	-	-	-	-	-	-	-	6.0	-	-	-	-	-

NET STORE CHANGE BY CITY

12 MONTHS TO 30 June 2022

	No. Cities	Population (Mil.)	F45 Training	Anytime Fitness	CrossFit	Snap Fitness	Plus Fitness AU	Body Fit Training Australia	Jet's Fitness	Physioiq	Goodlife Health Clubs	KX Pilates	UBX	Club Lime Group	Fernwood Fitness	Fitness First	Fitstop Australia	Curves	Zap Fitness	Vision PT	Studio Pilates	EFM Health Clubs	Genesis Fitness New	9 rounds
Australia	126	25.7	+7	+20	-	+11	+3	+38	-8	-	+1	+12	-	-	+3	-1	+24	-9	+1	-1	+14	-4	-1	-3
Tier 1 > 1 Million	5	16.6	+2	+19	-	+8	+1	+30	-10	-	+2	+9	+13	-	+4	-1	+14	-4	-	-2	+9	-4	-2	-2
Greater Sydney	1	5.4	-1	+8	-	+3	+2	+5	-6	-	-	+5	+1	-	+2	-1	+1	-1	-	-2	+5	-1	-	-
Greater Melbourne	1	5.1	+2	+5	-	+1	-1	+11	-	-	-	+1	+2	-	+2	-	+3	-	-	-	-	-2	-2	-1
Greater Brisbane	1	2.6	+1	+6	-	+1	+1	+4	-2	-	+2	+1	+9	-	-	-	+9	-2	-	-	+4	-	-	-1
Greater Perth	1	2.1	-	-	-	+3	-1	+2	-2	-	-	+1	+1	-	-	-	+1	-1	-	-	+1	-	-	-
Greater Adelaide	1	1.4	-	-	-	-	-	+8	-	-	-	+1	-	-	-	-	-	-	-	-	-1	-1	-	-
Tier 2 200,000-1 Mil.	6	2.2	-	+2	-	+1	+2	+4	+2	-	-	+2	-	-	-	-	+4	-	-	+1	+5	-	-	-
Gold Coast	1	0.6	-	+1	-	-	+1	+2	+1	-	-	-	-	-	-	-	+1	-	-	-	+4	-	-	-
Australian Capital Territory	1	0.4	-	-	-	-	+1	-	-	-	-	+1	-	-	-	-	-	-	-	-	-	-	-	-
Newcastle	1	0.3	-	-	-	+1	-	+1	-1	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Wollongong	1	0.3	-	-	-	-	-	+1	-	-	-	-	-	-	-	-	-	-	-	+1	-	-	-	-
Sunshine Coast	1	0.3	-	+1	-	-	-	-	+2	-	-	-	-	-	-	-	+2	-	-	-	-	-	-	-
Greater Hobart	1	0.2	-	-	-	-	-	-	-	-	-	-	-	-	-	-	+1	-	-	-	+1	-	-	-
Tier 3* 100-200,000	7	1.0	-	-	-	+2	-	-	-	-	-1	+1	+2	-	-1	-	+2	-	+1	-	-	-	-	-
Townsville	1	0.2	-	-	-	-	-	-	-	-	-	+1	+1	-	-	-	+1	-	-	-	-	-	-	-
Geelong	1	0.2	-	-	-	-	-	-	-	-	-1	-	-	-	-1	-	-	-	+1	-	-	-	-	-
Cairns	1	0.2	-	-	-	-	-	-	-	-	-	-	+1	-	-	-	-	-	-	-	-	-	-	-
Greater Darwin	1	0.1	-	-	-	+1	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Ballarat	1	0.1	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Toowoomba	1	0.1	-	-	-	-	-	-	-	-	-	-	-	-	-	-	+1	-	-	-	-	-	-	-
Tier 4 50-100,000	11	0.7	-	-1	-	-	-	+1	-	-	-	-	-	-	-	-	+2	-1	-	-	-	-	-	-
Tier 5 20-50,000	38	1.1	+2	-	-	-	-	+3	-	-	-	-	-	-	-	-	+1	-2	-	-	-	-	+1	-1
Tier 6 10-20,000	59	0.8	+2	-1	-	-	-	-	-	-	-	-	-	-	-	-	-	-2	-	-	-	-	-	-

78 STORE OPENINGS 6 MONTHS TO 30 June 2022

10 STORE CLOSURES 6 MONTHS TO 30 June 2022

Brand	Suburb	State
ANYTIME FITNESS	BELMORE	NSW
ANYTIME FITNESS	GRANVILLE (NSW)	NSW
ANYTIME FITNESS	HABERFIELD	NSW
ANYTIME FITNESS	KINGSFORD	NSW
ANYTIME FITNESS	NAMBUCCA HEADS	NSW
ANYTIME FITNESS	NORTH RYDE	NSW
ANYTIME FITNESS	REDFERN	NSW
ANYTIME FITNESS	ASHMORE	QLD
ANYTIME FITNESS	CURRUMBIN WATERS	QLD
ANYTIME FITNESS	IPSWICH	QLD
ANYTIME FITNESS	LITTLE MOUNTAIN	QLD
ANYTIME FITNESS	MOGGILL	QLD
ANYTIME FITNESS	PADDINGTON (QLD)	QLD
ANYTIME FITNESS	BRUNSWICK EAST	VIC
ANYTIME FITNESS	OFFICER	VIC
ANYTIME FITNESS	SOUTH MORANG	VIC
ANYTIME FITNESS	WANTIRNA SOUTH	VIC
BODY FIT TRAINING AUS	MAROUBRA	NSW
BODY FIT TRAINING AUS	MASCOT	NSW
BODY FIT TRAINING AUS	NEWCASTLE	NSW
BODY FIT TRAINING AUS	NORTH LAKES	QLD
BODY FIT TRAINING AUS	REDBANK PLAINS	QLD
BODY FIT TRAINING AUS	FULLARTON	SA
BODY FIT TRAINING AUS	PARA HILLS	SA
BODY FIT TRAINING AUS	CLAYTON	VIC
BODY FIT TRAINING AUS	FOOTSCRAY	VIC
BODY FIT TRAINING AUS	WANGARATTA (VIC.)	VIC
F45 TRAINING	AIRLIE BEACH	QLD
F45 TRAINING	MORAYFIELD	QLD
F45 TRAINING	NAMBOUR	QLD
F45 TRAINING	BURWOOD EAST	VIC
F45 TRAINING	WONTHAGGI	VIC
FERNWOOD FITNESS	GREGORY HILLS	NSW
FERNWOOD FITNESS	CRANBOURNE WEST	VIC
FITSTOP AUSTRALIA	BROOKVALE	NSW
FITSTOP AUSTRALIA	CALOUNDRA	QLD
FITSTOP AUSTRALIA	CLEVELAND (QLD)	QLD
FITSTOP AUSTRALIA	HAMILTON (QLD)	QLD
FITSTOP AUSTRALIA	KEPERRA	QLD
FITSTOP AUSTRALIA	MOUNT WARREN PARK	QLD
FITSTOP AUSTRALIA	NORTH IPSWICH	QLD
FITSTOP AUSTRALIA	WOOLLOONGABBA	QLD
FITSTOP AUSTRALIA	YARRABILBA	QLD
FITSTOP AUSTRALIA	BENTLEIGH	VIC
FITSTOP AUSTRALIA	OCEAN GROVE	VIC

Brand	Suburb	State
GENESIS FITNESS NEW	PORT MACQUARIE	NSW
KX PILATES	FYSHWICK	ACT
KX PILATES	CONCORD	NSW
KX PILATES	EDMONDSON PARK	NSW
KX PILATES	GLEBE	NSW
KX PILATES	MAROUBRA	NSW
KX PILATES	WOLLONGONG	NSW
KX PILATES	CARINA (QLD)	QLD
KX PILATES	CHRISTIES BEACH	SA
KX PILATES	MOUNT LAWLEY	WA
PLUS FITNESS AU	GREENWAY	ACT
PLUS FITNESS AU	KINGSWOOD (PENRITH - NSW)	NSW
PLUS FITNESS AU	MORAYFIELD	QLD
PLUS FITNESS AU	SOUTHPORT (QLD)	QLD
SNAP FITNESS	CAMPBELLTOWN (NSW)	NSW
SNAP FITNESS	CRANE BROOK	NSW
SNAP FITNESS	GLADESVILLE	NSW
SNAP FITNESS	ISLINGTON	NSW
SNAP FITNESS	COOLALINGA	NT
SNAP FITNESS	REDLAND BAY	QLD
SNAP FITNESS	BLACKBURN	VIC
SNAP FITNESS	TRAVANCORE	VIC
SNAP FITNESS	FREMANTLE	WA
SNAP FITNESS	GOLDEN BAY	WA
STUDIO PILATES	LANE COVE	NSW
STUDIO PILATES	MANLY (NSW)	NSW
STUDIO PILATES	NEUTRAL BAY	NSW
STUDIO PILATES	ZETLAND	NSW
STUDIO PILATES	COOLANGATTA (QLD)	QLD
STUDIO PILATES	HOPE ISLAND	QLD
STUDIO PILATES	MIAMI	QLD
STUDIO PILATES	STRATHPINE	QLD
STUDIO PILATES	BELLERIVE	TAS

Brand	Suburb	State
F45 TRAINING	EARLWOOD	NSW
FERNWOOD FITNESS	GEE LONG	VIC
GENESIS FITNESS NEW	BUNGALOW	QLD
GENESIS FITNESS NEW	MELBOURNE	VIC
GENESIS FITNESS NEW	SOUTHBANK	VIC
GOODLIFE HEALTH CL	BELMONT (VIC.)	VIC
GOODLIFE HEALTH CL	CANNINGTON	WA
PLUS FITNESS AU	NEDLANDS	WA
VISION PT	ROSEBERY	NSW
VISION PT	SYDNEY	NSW



GapMaps
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