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**2022 Mid-Year Network Report**

# **Health & Fitness Centres**

**1st July 2021 – 30<sup>th</sup> June 2022**  
**New Zealand**



## Introduction

We are pleased to share our 2022 Mid-Year Network Report for New Zealand'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 New Zealand. 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

8 Brands Tracked

307 Locations

13 Centres Opened\*

3 Centres Closed\*

	Total Stores	Last 12 Months			Last 3 Months		
		Openings	Closures	Net Change	Openings	Closures	Net Change
F45 Training	91	4	-	+4	1	-	+1
Jetts Fitness	55	1	-	+1	1	-	+1
Anytime Fitness	55	2	-	+2	1	-	+1
City Fitness	41	1	-	+1	-	-	-
Flex Fitness	29	3	-	+3	-	-	-
Vibra Train	13	-	-	-	-	-	-
Les Mills	12	-	-	-	-	-	-
Curves	11	2	3	-1	-	-	-
<b>Total (8 Brands)</b>	<b>307</b>	<b>13</b>	<b>3</b>	<b>+10</b>	<b>3</b>	<b>-</b>	<b>+3</b>

\*12 months to 30 June 2022

# CENTRE COUNT BY CITY

## 30 June 2022

	No. Clusters	Population (Mil.)	F45 Training	Jetis Fitness	Anytime Fitness	City Fitness	Flex Fitness	Vibra Train	Les Mills	Curves
<b>New Zealand</b>	<b>165</b>	<b>4.8</b>	<b>91</b>	<b>55</b>	<b>55</b>	<b>41</b>	<b>29</b>	<b>13</b>	<b>12</b>	<b>11</b>
Tier 1 > 1 Million	1	1.6	38	30	26	13	9	7	6	3
Greater Auckland		1.6	38	30	26	13	9	7	6	3
Tier 2 200,000-1 Mil.	3	1.3	24	13	16	15	8	1	5	1
Greater Christchurch		0.5	10	1	10	5	3	-	1	1
Greater Wellington		0.5	9	8	1	9	-	-	3	-
Hamilton Region		0.3	5	4	5	1	5	1	1	-
Tier 3 100-200,000	4	0.6	9	5	7	5	8	2	1	-
Tauranga		0.2	3	1	3	1	3	2	-	-
Hastings		0.1	2	2	3	2	3	-	-	-
Palmerston North Region		0.1	2	1	-	2	1	-	-	-
Greater Dunedin		0.1	2	1	1	-	1	-	1	-
Tier 4 50-100,000	5	0.4	6	2	3	4	2	1	-	2
Greater Nelson		0.1	3	-	-	2	-	-	-	-
Greater Whangarei		0.1	-	1	-	-	-	-	-	-
New Plymouth		0.1	1	1	1	1	1	-	-	2
Rotorua		0.1	1	-	1	-	1	-	-	-
Invercargill		0.1	1	-	1	1	-	1	-	-
Tier 5 20-50,000	9	0.3	9	4	2	4	2	-	-	2
Tier 6 10-20,000	14	0.2	1	-	-	-	-	1	-	1
Other	129	0.2	4	1	1	-	-	1	-	2

# CENTRES PER MILLION RESIDENTS BY CITY

## 30 June 2022

	No. Clusters	Population (Mil.)	F45 Training	Jetts Fitness	Anytime Fitness	City Fitness	Flex Fitness	Vibra Train	Les Mills	Curves
<b>New Zealand</b>	<b>165</b>	<b>4.8</b>	<b>19</b>	<b>12</b>	<b>12</b>	<b>9</b>	<b>6</b>	<b>3</b>	<b>3</b>	<b>2</b>
<b>Tier 1 &gt; 1 Million</b>	<b>1</b>	<b>1.6</b>	<b>24</b>	<b>19</b>	<b>16</b>	<b>8</b>	<b>6</b>	<b>4</b>	<b>4</b>	<b>2</b>
Greater Auckland		1.6	24	19	16	8	6	4	4	2
<b>Tier 2 200,000-1 Mil.</b>	<b>3</b>	<b>1.3</b>	<b>18</b>	<b>10</b>	<b>12</b>	<b>11</b>	<b>6</b>	<b>1</b>	<b>4</b>	<b>1</b>
Greater Christchurch		0.5	20	2	20	10	6	-	2	2
Greater Wellington		0.5	18	16	2	18	-	-	6	-
Hamilton Region		0.3	17	13	17	3	17	3	3	-
<b>Tier 3 100-200,000</b>	<b>4</b>	<b>0.6</b>	<b>15</b>	<b>8</b>	<b>12</b>	<b>8</b>	<b>13</b>	<b>3</b>	<b>2</b>	<b>-</b>
Tauranga		0.2	17	6	17	6	17	11	-	-
Hastings		0.1	14	14	21	14	21	-	-	-
Palmerston North Region		0.1	15	7	-	15	7	-	-	-
Greater Dunedin		0.1	16	8	8	-	8	-	8	-
<b>Tier 4 50-100,000</b>	<b>5</b>	<b>0.4</b>	<b>16</b>	<b>5</b>	<b>8</b>	<b>10</b>	<b>5</b>	<b>3</b>	<b>-</b>	<b>5</b>
Greater Nelson		0.1	31	-	-	21	-	-	-	-
Greater Whangarei		0.1	-	12	-	-	-	-	-	-
New Plymouth		0.1	13	13	13	13	13	-	-	26
Rotorua		0.1	14	-	14	-	14	-	-	-
Invercargill		0.1	17	-	17	17	-	17	-	-
<b>Tier 5 20-50,000</b>	<b>9</b>	<b>0.3</b>	<b>32</b>	<b>14</b>	<b>7</b>	<b>14</b>	<b>7</b>	<b>-</b>	<b>-</b>	<b>7</b>
<b>Tier 6 10-20,000</b>	<b>14</b>	<b>0.2</b>	<b>6</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>6</b>	<b>-</b>	<b>6</b>
<b>Other</b>	<b>129</b>	<b>0.2</b>	<b>18</b>	<b>4</b>	<b>4</b>	<b>-</b>	<b>-</b>	<b>4</b>	<b>-</b>	<b>9</b>

# NET CENTRE CHANGE BY CITY

## 12 MONTHS TO 30 June 2022

	No. Cities	Population (Mil.)	F45 Training	Jetts Fitness	Anytime Fitness	City Fitness	Flex Fitness	Vibra Train	Les Mills	Curves
<b>New Zealand</b>	<b>165</b>	<b>4.8</b>	+4	+1	+2	+1	+3	-	-	-1
Tier 1 > 1 Million	1	1.6	+2	-	+2	-	+1	-	-	+1
Greater Auckland	-	1.6	+2	-	+2	-	+1	-	-	+1
Tier 2 200,000-1 Mil.	3	1.3	+1	-	-	-	+1	-	-	-2
Greater Christchurch	-	0.5	-	-	-	-	-	-	-	-
Greater Wellington	-	0.5	-	-	-	-	-	-	-	+1
Hamilton Region	-	0.3	+1	-	-	-	+1	-	-	+1
Tier 3 100-200,000	4	0.6	-	+1	-	-	+1	-	-	-
Tauranga	-	0.2	-	-	-	-	+1	-	-	-
Hastings	-	0.1	-	+1	-	-	-	-	-	-
Palmerston North Region	-	0.1	-	-	-	-	-	-	-	-
Greater Dunedin	-	0.1	-	-	-	-	-	-	-	-
Tier 4 50-100,000	5	0.4	-	-	-	+1	-	-	-	-
Greater Nelson	-	0.1	-	-	-	-	-	-	-	-
Greater Whangarei	-	0.1	-	-	-	-	-	-	-	-
New Plymouth	-	0.1	-	-	-	-	-	-	-	-
Rotorua	-	0.1	-	-	-	-	-	-	-	-
Invercargill	-	0.1	-	-	-	+1	-	-	-	-
Tier 5 20-50,000	9	0.3	-	-	-	-	-	-	-	-
Tier 6 10-20,000	14	0.2	+1	-	-	-	-	-	-	-

## 6 CENTRE OPENINGS 6 MONTHS TO 30 June 2022

Brand	Suburb	Region
ANYTIME FITNESS	NEWMARKET	AUCKLAND
F45 TRAINING	HILLSBOROUGH NORTH (AUCKL)	AUCKLAND
FLEX FITNESS	MANUREWA CENTRAL	AUCKLAND
FLEX FITNESS	OTAWA	BAY OF PLENTY
FLEX FITNESS	DINSDALE SOUTH	WAIKATO
JETTS FITNESS	HASTINGS CENTRAL	HAWKE'S BAY

## 3 CENTRE CLOSURES 6 MONTHS TO 30 June 2022

Brand	Suburb	Region
CURVES	WHANGAREI CENTRAL	NORTHLAND
CURVES	CHARTWELL	WAIKATO
CURVES	PAREMATA	WELLINGTON



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**For further information**

**Please Contact**

**Scott Johnson**

**Senior Analyst**

scott@gapmaps.com

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GapMaps Head Office  
Suite 1, Level 1, 425 Docklands Drive  
Docklands, 3008, Australia

+ 61 3 9670 4569 | info@gapmaps.com | www.gapmaps.com