



**Annual Network Report  
Health & Fitness Centres**

**1st January - 31st December 2023**

[www.gapmaps.com](http://www.gapmaps.com)

## Health & Fitness Centres

# Australia Annual Network Report

Australians spent up to AUD 3.5 Billion on Fitness Clubs and Gyms in 2023, based on GapMaps estimates powered by CommBank iQ. This equates to approximately 1 in 5 Australians having a gym membership\*.

Servicing this demand, the top fitness chains across Australia have over 3,000 locations, as outlined in this 2023 GapMaps Health and Fitness Centres annual report which tracks the largest 27 brands within the sector.

This report suggests that Sydney residents might be fitter than those in Melbourne, with 16% higher gym spending per capita and a 13% higher ratio of major gym locations per capita. However, there are major variations in both gym spending per capita and gym store provisions across each city as outlined in detail within the GapMaps platform.

Anytime Fitness remains the largest chain nationally with 561 locations, adding a net additional 11 locations over 2023. 61% of all Australians live within 3km of an Anytime Fitness including 89% of Sydneysiders.

Despite cost-of-living headwinds, the sector continued to grow, with the majority of operators increasing their network size in 2023. Excluding F45, the tracked brands added a net 53 locations in 2023.

Brands such as Fitstop and BFT continued major expansions, adding 39 and 27 locations respectively.

There has been some turbulence within the sector, with the much-publicised challenges at F45, who are now reporting 111 less locations on their company website versus 12 months prior. In addition, CrossFit now reports 39 less affiliated locations versus January 2023. For both of these brands, while they are reporting large declines on their websites, up to half of the locations appear still to be trading but their long-term affiliation with the brand is unclear.

GapMaps track the location of over 1,500 brands within Australia and this provides insights on where brands are clustering and the observable expansion and optimisation strategies of each brand. In addition, GapMaps has partnered with CommBank iQ to provide insight on the real spending habits of consumers at a local level, including on Fitness Clubs and Gym spending. This detailed analysis of supply and demand within the sector empowers GapMaps users to better understand, optimise and grow their store networks.

*\*based on residents aged 18 and over and assuming an average gym membership cost of AUD 70 per month.*



Health & Fitness Centres

# Australia Annual Network Report

Brands Tracked

**27**

Locations

**3,290**

	Total	Last 12 Months*	Accessibility
		Net Change	Share of total Australian residents living within 3km of a fitness centre:
Anytime Fitness	561	+11	61%
CrossFit	443	-39	43%
F45 Training***	391	-111	49%
Snap Fitness	242	+10	36%
Plus Fitness AU	198	+5	26%
BFT	178	+27	28%
Jetts Fitness**	128	-38	20%
Fitstop Australia	126	+39	19%
Club Lime Group	104	+6	16%
KX Pilates	104	+11	21%
Goodlife Health Clubs	96	-	17%
Zap Fitness**	86	+31	13%
Studio Pilates	79	+11	13%
Fernwood Fitness	71	-1	15%
UBX	68	-9	13%
Vision PT	51	-	11%
Fitness First	50	-1	11%
Strong Pilates	44	+8	10%
Genesis Fitness	41	+2	6%
World Gym	39	-2	7%
Curves	34	-17	5%
Revo Fitness	34	+3	6%
EFM Health Clubs	34	-4	5%
Derrimut 24:7 Gym	25	-	4%
EMF Fitness	25	+1	4%
CorePlus	24	+3	6%
9 rounds	14	-4	4%
<b>Total (27 Brands)</b>	<b>3,290</b>	<b>-58</b>	<b>79%</b>
<i>Total (26 Brands, Excl. F45)</i>	<i>2,899</i>	<i>+53</i>	<i>78%</i>

\* Opening dates as per listing on company website, actual opening dates may vary. Where possible relocations (e.g. within the same Shopping Centre) are not included as an opening/closure.

\*\* 34 Jetts Fitness sites have been sold to Zap Fitness.

\*\*\* F45 currently report 391 locations on their company website, a decline of 111 locations from 12 months prior. GapMaps acknowledge that that up to half of the locations no longer listed on the F45 website are listed as trading within google maps. Their current and long term affiliation with F45 is unclear.

## Health & Fitness Centres

# City Comparison

	Total
Anytime Fitness	561
CrossFit	443
F45 Training***	391
Snap Fitness	242
Plus Fitness AU	198
BFT	178
Jetts Fitness**	128
Fitstop Australia	126
Club Lime Group	104
KX Pilates	104
Goodlife Health Clubs	96
Zap Fitness**	86
Studio Pilates	79
Fernwood Fitness	71
UBX	68
Vision PT	51
Fitness First	50
Strong Pilates	44
Genesis Fitness	41
World Gym	39
Curves	34
Revo Fitness	34
EFM Health Clubs	34
Derrimut 24:7 Gym	25
EMF Fitness	25
CorePlus	24
9 rounds	14
<b>Total (27 Brands)</b>	<b>3,290</b>
<i>Total (26 Brands, Excl. F45)</i>	<i>2,899</i>

### Count By Major City

	Sydney	Melbourne	Brisbane	Perth	Adelaide	Other
Anytime Fitness	169	105	53	31	43	160
CrossFit	83	58	55	39	14	194
F45 Training***	102	67	41	42	15	124
Snap Fitness	38	41	52	31	7	73
Plus Fitness AU	126	7	6	29	5	25
BFT	20	73	17	11	16	41
Jetts Fitness**	10	24	30	23	-	41
Fitstop Australia	6	9	49	16	6	40
Club Lime Group	17	18	15	-	-	54
KX Pilates	33	35	2	7	14	13
Goodlife Health Clubs	-	27	30	14	13	12
Zap Fitness**	-	27	7	7	17	28
Studio Pilates	11	4	29	4	7	24
Fernwood Fitness	18	22	10	2	3	16
UBX	10	20	13	2	2	21
Vision PT	38	7	1	-	-	5
Fitness First	37	11	-	-	-	2
Strong Pilates	7	8	5	4	5	15
Genesis Fitness	1	11	2	8	-	19
World Gym	9	-	9	4	-	17
Curves	8	10	-	1	2	13
Revo Fitness	1	3	-	23	5	2
EFM Health Clubs	2	5	-	-	22	5
Derrimut 24:7 Gym	-	9	1	-	10	5
EMF Fitness	4	-	7	-	-	14
CorePlus	-	21	1	-	-	2
9 rounds	2	6	1	4	-	1
<b>Total (27 Brands)</b>	<b>752</b>	<b>628</b>	<b>436</b>	<b>302</b>	<b>206</b>	<b>966</b>
<i>Total (26 Brands, Excl. F45)</i>	<i>650</i>	<i>561</i>	<i>395</i>	<i>260</i>	<i>191</i>	<i>842</i>

### Net Change\*: Last 12 Months: By Major City

	Sydney	Melbourne	Brisbane	Perth	Adelaide	Other	Total
Anytime Fitness	+6	+1	+1	-	-1	+4	+11
CrossFit	-2	-5	-3	-4	-1	-24	-39
F45 Training***	-35	-25	-18	-8	-10	-15	-111
Snap Fitness	+3	+2	+2	-1	+1	+3	+10
Plus Fitness AU	+8	-	-	-1	-	-2	+5
BFT	+9	+7	+1	+1	+2	+7	+27
Jetts Fitness**	-	-18	-6	-10	-	-4	-38
Fitstop Australia	+5	+1	+9	+10	+6	+8	+39
Club Lime Group	+2	+3	+2	-	-	-1	+6
KX Pilates	+6	+1	-	+1	+1	+2	+11
Goodlife Health Clubs	-	-	-	-1	+1	-	-
Zap Fitness**	-	+14	+7	+7	-1	+4	+31
Studio Pilates	-	+2	+3	+1	-	+5	+11
Fernwood Fitness	+1	-1	-	-	-	-1	-1
UBX	-1	-3	-5	-1	-	+1	-9
Vision PT	-	-1	-	-	-	+1	-
Fitness First	-	-	-1	-	-	-	-1
Strong Pilates	-	+2	-1	+2	+1	+4	+8
Genesis Fitness	-	-	-1	+3	-	-	+2
World Gym	-	-	-2	-	-	-	-2
Curves	+1	+2	+3	-1	-	-22	-17
Revo Fitness	-	+1	-	+2	-	-	+3
EFM Health Clubs	-	-2	-	-	-2	-	-4
Derrimut 24:7 Gym	-	-	-	-	-	-	-
EMF Fitness	+1	-	-	-	-	-	+1
CorePlus	-	+3	-	-	-	-	+3
9 rounds	-	-3	-1	-	-	-	-4
<b>Total (27 Brands)</b>	<b>+4</b>	<b>-19</b>	<b>-10</b>	<b>-</b>	<b>-3</b>	<b>-30</b>	<b>-58</b>
<i>Total (26 Brands, Excl. F45)</i>	<i>+39</i>	<i>+6</i>	<i>+8</i>	<i>+8</i>	<i>+7</i>	<i>-15</i>	<i>+53</i>

\* Opening dates as per listing on company website, actual opening dates may vary. Where possible relocations (e.g. within the same Shopping Centre) are not included as an opening/closure.

\*\* 34 Jetts Fitness sites have been sold to Zap Fitness.

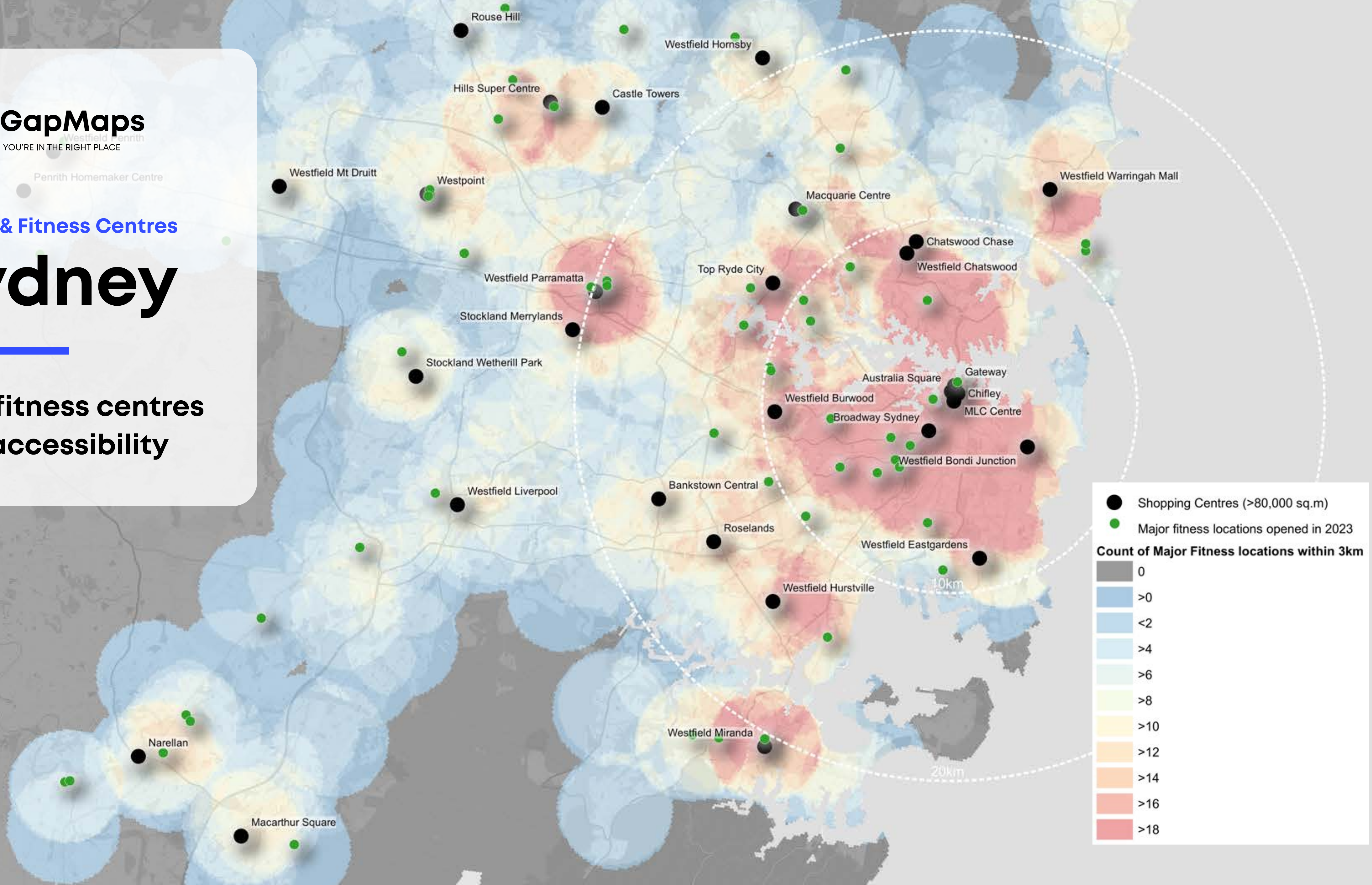
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## Health & Fitness Centres

# Sydney

New fitness centres  
and accessibility





## Health & Fitness Centres

# Sydney

## New fitness centres and accessibility

		<b>Last 12 Months*</b>	<b>Accessibility</b>
	<b>Total</b>	<b>Net Change</b>	<b>Share of total Australian residents living within 3km of a fitness centre:</b>
Anytime Fitness	169	+6	89%
CrossFit	83	-2	62%
F45 Training***	102	-35	74%
Snap Fitness	38	+3	47%
Plus Fitness AU	126	+8	81%
BFT	20	+9	25%
Jetts Fitness**	10	-	17%
Fitstop Australia	6	+5	10%
Club Lime Group	17	+2	26%
KX Pilates	33	+6	38%
Goodlife Health Clubs	-	-	0%
Zap Fitness**	-	-	0%
Studio Pilates	11	-	12%
Fernwood Fitness	18	+1	25%
UBX	10	-1	15%
Vision PT	38	-	40%
Fitness First	37	-	35%
Strong Pilates	7	-	11%
Genesis Fitness	1	-	2%
World Gym	9	-	14%
Curves	8	+1	10%
Revo Fitness	1	-	3%
EFM Health Clubs	2	-	4%
Derrimut 24:7 Gym	-	-	0%
EMF Fitness	4	+1	5%
CorePlus	-	-	0%
9 rounds	2	-	5%
<b>Total (27 Brands)</b>	<b>752</b>	<b>+4</b>	<b>95%</b>
<i>Total (26 Brands, Excl. F45)</i>	<i>650</i>	<i>+39</i>	<i>95%</i>

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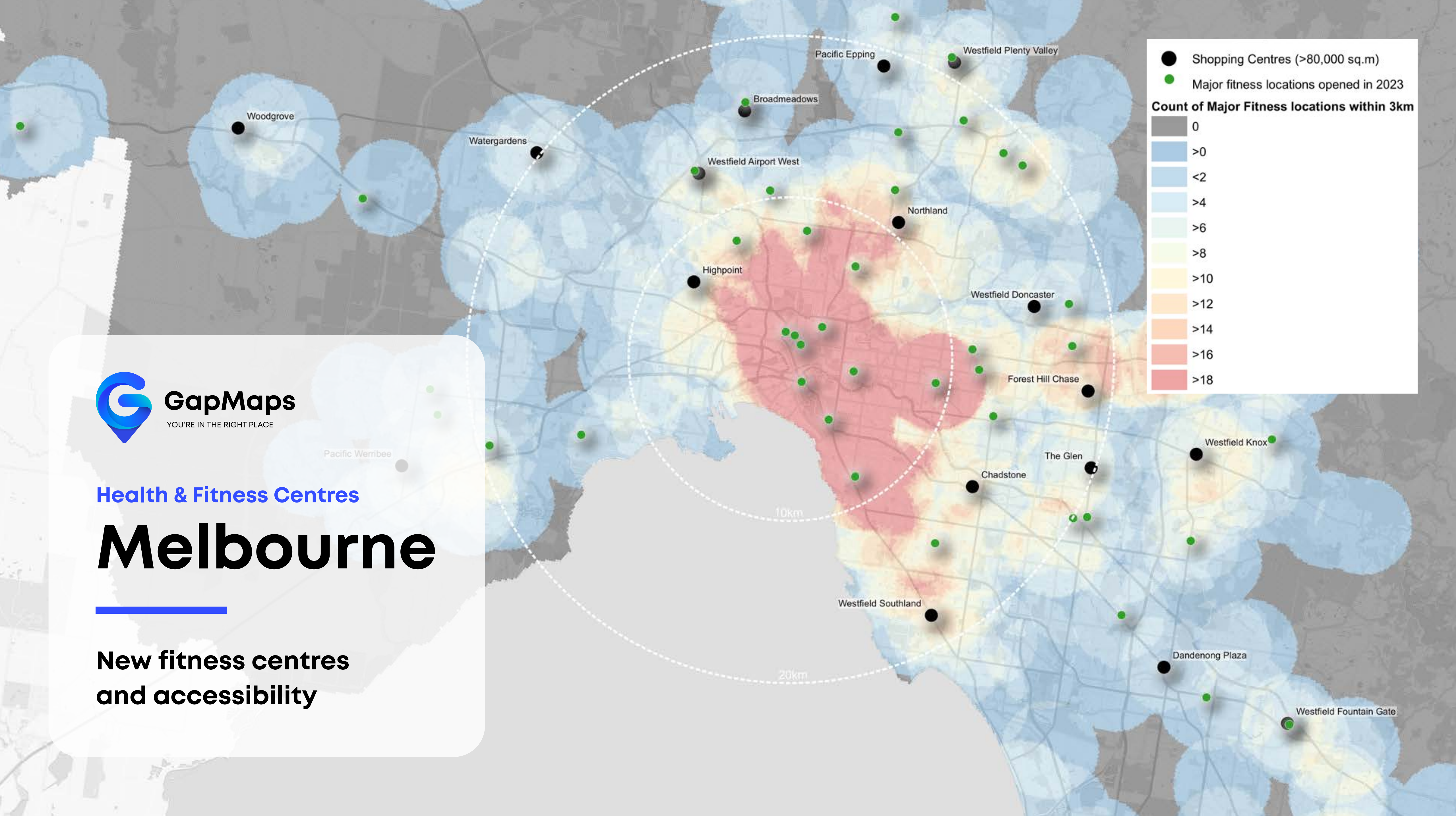
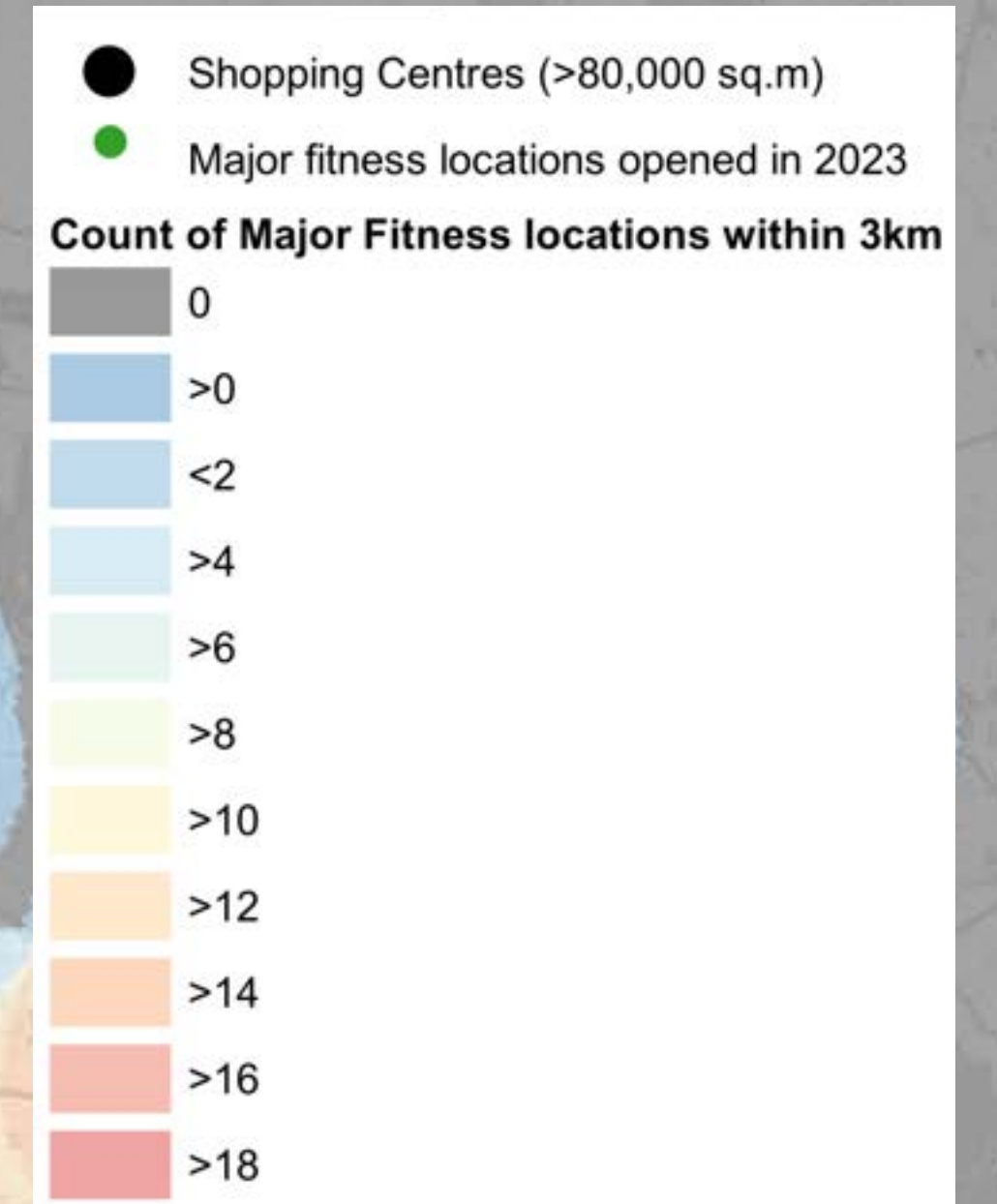
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Health & Fitness Centres

# Melbourne

New fitness centres  
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## Health & Fitness Centres

# Melbourne

## New fitness centres and accessibility

	Total	Last 12 Months*	Accessibility
		Net Change	Share of total Australian residents living within 3km of a fitness centre:
Anytime Fitness	105	+1	75%
CrossFit	58	-5	46%
F45 Training***	67	-25	57%
Snap Fitness	41	+2	44%
Plus Fitness AU	7	-	10%
BFT	73	+7	57%
Jetts Fitness**	24	-18	23%
Fitstop Australia	9	+1	15%
Club Lime Group	18	+3	22%
KX Pilates	35	+1	38%
Goodlife Health Clubs	27	-	33%
Zap Fitness**	27	+14	32%
Studio Pilates	4	+2	8%
Fernwood Fitness	22	-1	28%
UBX	20	-3	24%
Vision PT	7	-1	11%
Fitness First	11	-	16%
Strong Pilates	8	+2	12%
Genesis Fitness	11	-	13%
World Gym	-	-	0%
Curves	10	+2	9%
Revo Fitness	3	+1	3%
EFM Health Clubs	5	-2	6%
Derrimut 24:7 Gym	9	-	8%
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CorePlus	21	+3	28%
9 rounds	6	-3	10%
<b>Total (27 Brands)</b>	<b>628</b>	<b>-19</b>	<b>92%</b>
<i>Total (26 Brands, Excl. F45)</i>	<i>561</i>	<i>+6</i>	<i>91%</i>

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# Want to learn more?

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