



inColour

September 2023

Interact: AreaSearch.com.au/incolour/fitnesscentres

Image: courtesy UBX Alexandria

CONCENTRICS

FITNESS CENTRES

Introduction

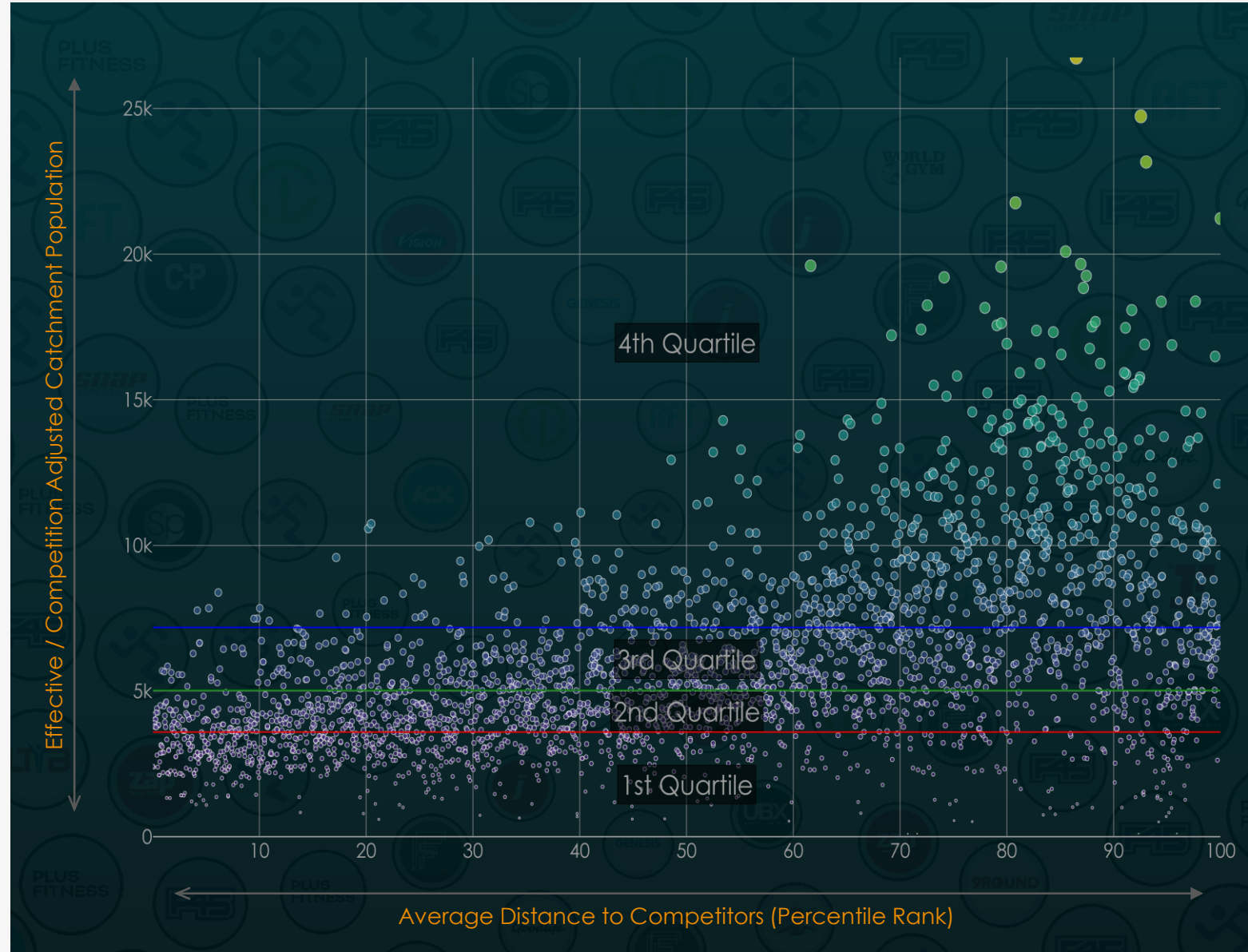
Playing a key role in driving the health goals of Australians, the fitness industry has seen notable transformation in recent years with new and exciting offerings coinciding with increased investor interest in the sector. With an average of 9,311 people per fitness centre nationally, and a standard deviation of 3,169 in the effective population capture of the average fitness centre catchment, our latest research highlights notable variations across regions, pointing to both opportunities and risks for sector participants, as shown on a national basis adjacent.

Putting retail performance in perspective on a sector-by-sector basis, the 'inColour' series aims to serve as a yardstick for those seeking to action assets and locations likely to outperform, while operating in a timely and efficient manner.

To help owners best secure and position assets, the AreaSearch approach to retail analysis looks beyond the standard 'population per store' approach commonly referred to in the industry. Instead, our approach which we call 'concentric radials', assesses each retail location and its competitiveness, by gauging proximity to, and likely capture of, its local target market considering the intersecting property catchments of each surrounding retailer in its peer group. This integral component of the assessment process draws on a deep database of **hundreds of thousands of retail locations** across the country, and cross-references that against every verified address and resident location in Australia.

We hope this approach provides a fresh perspective and opens new opportunities for our clients, such as that detailed overleaf. For those seeking further information on our process or results, please reach out at areasearch.com.au/contact

Covering 25 major fitness centre retailers across 2,818 locations nationwide

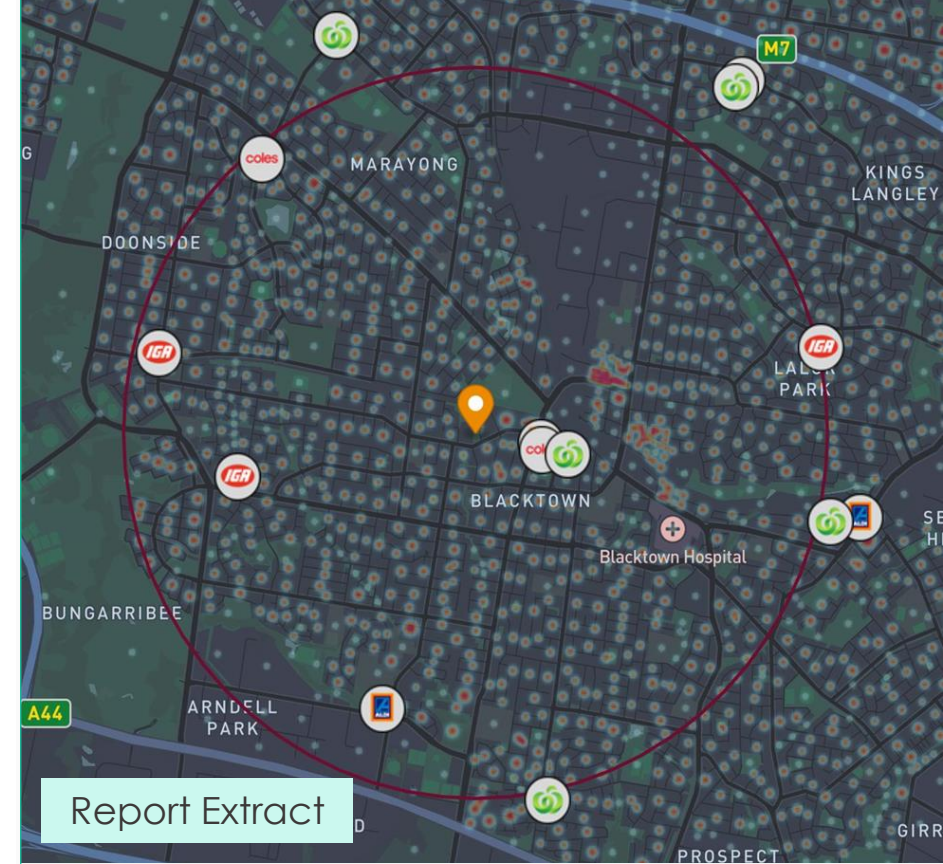


77 Kildare Road, Blacktown, NSW

This month our valued client, Revelop, used the AreaSearch concentric radials methodology and reporting to help identify and acquire 77 Kildare Road in Blacktown, a site the market had largely passed on, secure a major 4,000sqm supermarket tenant prior to exchanging and is now swamped with tenant enquiry...

AreaSearch’s concentric radials methodology assesses any property instantly by dividing a catchment into 10 concentric rings per retailer then allocating the latest, address-level, population to each ring’s ‘share’ divided by the competition that is intersected at each level. This is deemed the ‘effective’ population, with an accumulation figure also shown that gives guidance as to gains nearer the origin. In this report, we have run that analysis on Every Major Supermarket in Australia, which has shown some clear standout opportunities ... as well as a number of risks, **some of which show on assets currently for sale.**

An excerpt of this process is shown for Revelop’s recent 77 Kildare Road acquisition. The effective population share for a potential supermarket on the site was assessed at 11,075 people, against an average across greater Sydney of 8,017 people per store, showing a clear opportunity for a supermarket and a number of other tenant categories. With the AI generated reporting available within an hour, Revelop were then able to gain internal comfort in the deal’s viability and easily convey this to secure major tenants. While this analysis style is somewhat theoretical, we trust it can continue to add value to our clients’ processes.



Report Extract

“We like deals where there is something the general market is missing, that tends to be when you can get a standout result be it in purchasing or leasing and 77 Kildare is a prime example.

Within one hour of looking at the site we had a 100+ page report that analysed and mapped every retail category highlighting clear opportunities for supermarket, liquor, gym and pharmacy especially, we then showed this to our supermarket client who promptly agreed and the deal was done. This is something that simply wasn’t possible in 2022,”

**– Charbel Hazzouri,
Managing Director, Revelop**



Our thanks for sharing this case study

Operator	Distance Site Nearest	Population		
		Total	Effective	Accum.
		Catch. Share Rng		
		Effective	Accumulation	
site	0 549	83,767	11,075 18,790	13.2% 22.4%
ALDI Blacktown	549 62	76,029	10,780 15,482	12.8% 18.5%
Coles Blacktown	572 62	75,378	10,771 14,969	12.7% 17.9%
Woolworths Blacktown	800 229	71,848	10,231 15,590	11.9% 18.6%
IGA SUPA VALU Doonside	2,069 1,212	50,356	11,494 14,431	9.7% 17.2%
ALDI Arndell Park	2,383 1,597	43,089	7,995 11,746	8.1% 14.0%
IGA Doonside North	2,787 1,212	38,464	7,427 10,286	7.8% 12.3%
Coles Doonside	2,917 1,201	32,615	6,904 9,868	6.2% 13.3%

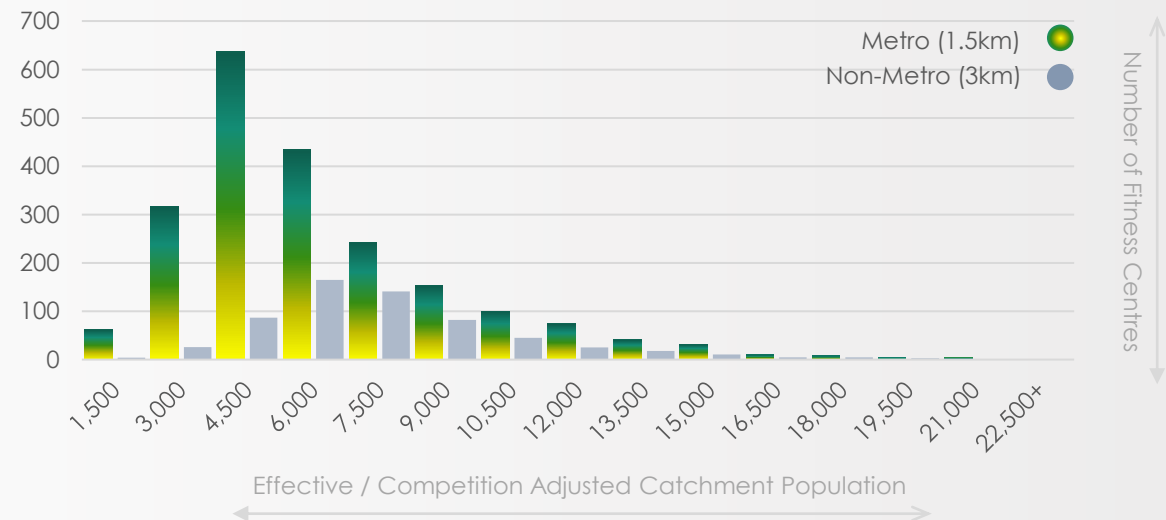
City & State Trends

View interactive detail: AreaSearch.com.au/incolour/fitnesscentres

Covering a total of 2,818 fitness centres in Australia, the research summarised in this report has revealed notable differences in market composition across the country, highlighting the need for operators to select a location-appropriate approach when seeking to expand into new regions, or optimise existing assets. The 'population per store' indicator, a critical consideration of many retail operators, showed high variation across regions, ranging from averages of 6,499 (Australian Capital Territory) to 13,681 (Darwin) across the greater capital regions and 10,258 (Qld) to 101,314 (NT) across non-metro regions. Naturally, the average travel distance required to reach critical mass was found to differ to an even greater extent across the country, though with variations population density playing a key role.

The key takeaways from this report, however, are those gleaned at the catchment level, when assessing the primary trade areas of each fitness centre in light of its surrounding competitors and their respective trade areas. Analysis on this basis revealed significant differences among the country's operators with the standard deviation in effective/competition and proximity adjusted population per store amounting to 57.8% of the average in metro regions and 55.4% in non-metro regions. The following pages look further into the trends observed at the sub-regional level across each state highlighting differences in typical catchment competitiveness.

Number of Stores By Effective Population Cohort



Sources: ABS / AreaSearch

Average Catchment Metrics *

	Stores Assessed	Population Per Store	Population Count	Store Count	Effective Population	Std Deviation	Competition Dist. (m) **
Greater Sydney	705	7,578	89,832	6.6	7,186	3,259	1,086
Greater Melbourne	578	8,802	75,642	5.6	8,050	4,404	1,232
Greater Brisbane	395	6,748	59,318	5.5	5,900	3,171	1,195
Greater Adelaide	156	9,158	49,706	3.1	8,328	3,490	1,526
Greater Perth	245	9,160	46,667	3.6	8,048	3,542	1,467
Greater Hobart	36	7,095	24,891	5.7	4,871	2,871	1,909
Greater Darwin	11	13,681	20,435	2.1	10,131	7,905	4,294
Australian Capital Territory	71	6,500	35,262	4.4	6,364	3,375	1,245
Non-Metro NSW	198	14,571	22,365	2.6	7,582	3,488	11,289
Non-Metro Vic.	97	16,465	24,430	2.7	7,144	3,349	7,984
Non-Metro Qld	266	10,259	30,773	3.5	6,228	2,574	10,268
Non-Metro SA	14	28,900	13,021	1.4	7,837	3,247	68,872
Non-Metro WA	31	18,222	12,856	2.2	6,258	3,341	104,128
Non-Metro Tas.	14	22,993	23,646	2.9	7,505	3,001	6,677
Non-Metro NT	1	101,314	21,224	1.0	21,224		809,298

* Metro - 1.5km Radial / Non-Metro - 3km Radial
 ** distance to 3 nearest



Greater Sydney

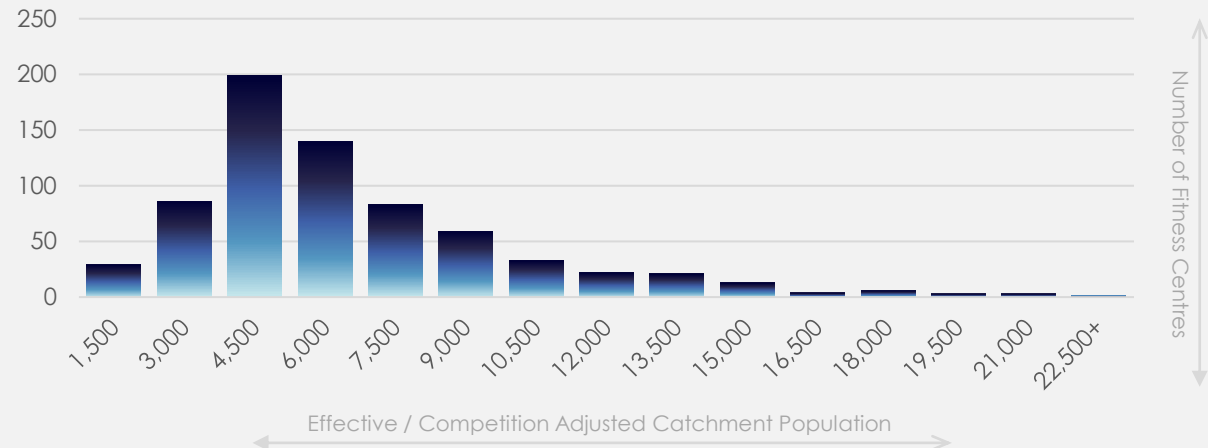
Our latest research has identified a total of 705 fitness centres in Greater Sydney and high variance in the average market composition among the region's SA4 subregions, with the effective (competition adjusted) population per fitness centre catchment assessed ranging from averages of 3,751 in the Sydney - City and Inner South region to 9,058 in Sydney - Inner South West across an adopted 1.5km catchment range.

In comparison to the other metro regions analysed nationally, the effective population capture within the typical fitness centre catchment in Greater Sydney was found to deviate at a fairly standard rate of 60.6% from the average level recorded across all of the region's fitness centre locations which sees the bulk of catchment effective population counts falling within the 2,300 to 9,400 range.

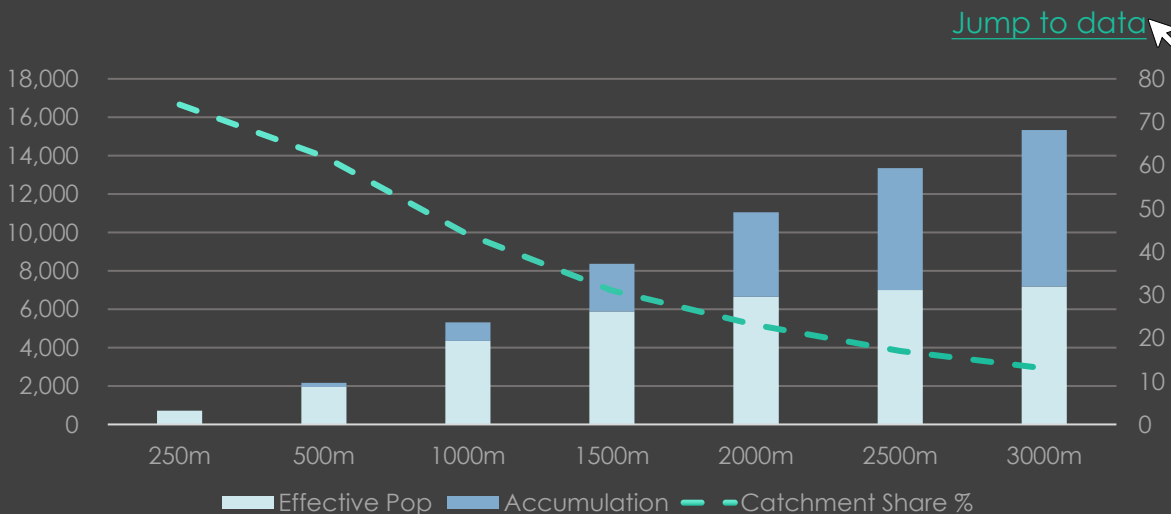


- Anytime Fitn.. - 165
- F45 - 131
- Plus Fitness - 126
- Snap Fitness - 40
- Other - 243

Number of Stores By Effective Population Cohort



Average Store Catchment Capture



Average 1.5km Catchment Metrics

	Stores Assessed	Population Per Store	Population Count	Store Count	Effective Population	Std Deviation	Competition Dist. (m)
Baulkham Hills and Hawkesbury	37	7,467	51,858	3.8	6,784	2,344	969
Blacktown	38	11,168	63,097	2.6	11,235	4,178	1,528
City and Inner South	89	3,842	177,694	19.7	4,154	893	394
Eastern Suburbs	39	6,772	133,247	6.5	6,871	1,998	551
Inner South West	66	9,246	108,727	4.4	9,340	2,450	1,106
Inner West	43	7,125	123,223	4.9	6,482	1,583	708
North Sydney and Hornsby	80	5,336	85,602	7.4	5,165	1,781	595
Northern Beaches	48	5,484	57,687	6.1	5,325	1,179	617
Outer South West	36	8,569	34,665	3.7	6,839	2,744	2,269
Outer West and Blue Mountains	31	10,894	32,364	2.6	8,468	3,363	3,467
Parramatta	50	10,015	101,557	4.6	9,283	2,252	1,169
Ryde	31	6,623	82,924	5.1	7,337	2,479	753
South West	51	9,701	63,247	3.0	9,902	3,588	1,423
Sutherland	39	5,956	55,965	4.8	5,892	1,104	626
Central Coast	27	12,952	22,373	2.4	9,302	5,430	2,465



Regional New South Wales

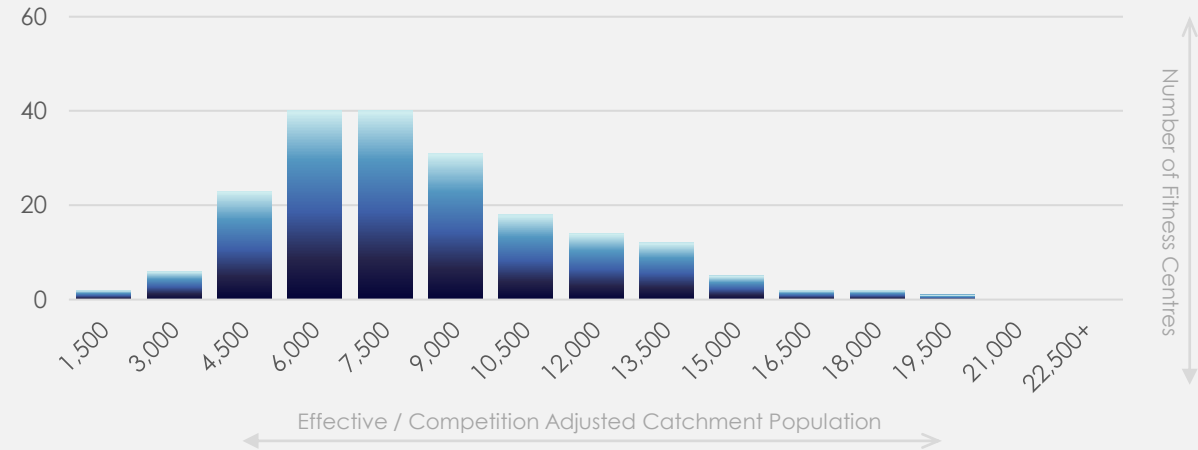
A total of 198 fitness centres were identified in Regional NSW while noticeable variance was observed in the average market composition among the region's SA4 subregions, with the effective (competition adjusted) population per fitness centre catchment assessed ranging from averages of 5,549 in the Southern Highlands and Shoalhaven region to 8,968 in Newcastle and Lake Macquarie across an adopted 3.0km catchment range.

In comparison to the other non-metro regions analysed nationally, the effective population capture within the typical fitness centre catchment in Regional NSW was found to deviate at a fairly standard rate of 48.5% from the average level recorded across all of the region's fitness centre locations with the majority of catchment effective population counts falling within the 4,100 to 11,000 range.

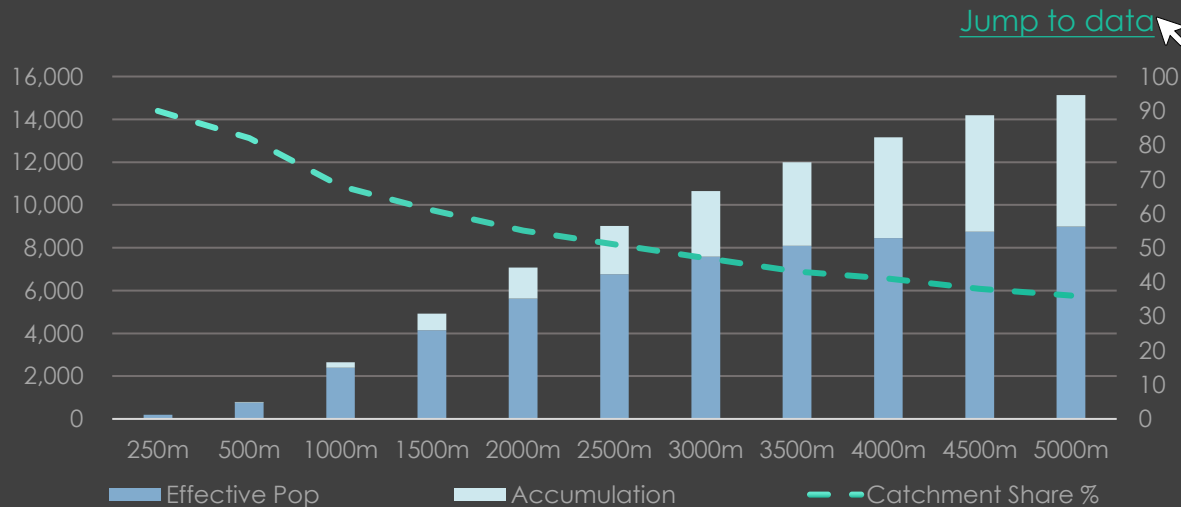


- Anytime Fitn.. - 69
- F45 - 44
- Plus Fitness - 15
- Club Lime - 12
- Other - 58

Number of Stores By Effective Population Cohort



Average Store Catchment Capture



Average 3km Catchment Metrics

	Stores Assessed	Population Per Store	Population Count	Store Count	Effective Population	Std Deviation	Competition Dist. (m)
Capital Region	14	17,386	15,223	1.9	6,544	2,941	20,970
Central West	12	17,954	16,591	1.7	8,126	1,947	29,715
Coffs Harbour - Grafton	12	12,354	18,266	2.5	5,582	1,652	8,941
Far West and Orana	4	29,508	22,167	2.0	8,815	4,022	1,670
Hunter Valley exc Newcastle	25	12,126	16,635	2.2	7,021	2,732	9,427
Illawarra	34	9,436	33,663	3.9	8,199	4,541	2,422
Mid North Coast	11	21,289	17,208	2.1	7,453	2,424	13,679
Murray	7	17,903	21,048	2.7	7,564	3,725	2,068
New England and North West	8	23,572	15,226	2.0	8,815	2,753	61,381
Newcastle and Lake Macquarie	34	11,745	34,587	3.3	8,968	3,315	2,273
Richmond - Tweed	14	18,585	16,207	2.5	6,806	4,811	6,722
Riverina	9	18,361	16,313	1.7	8,016	3,517	23,470
Southern Highlands and Shoalhaven	14	11,647	9,975	1.9	5,549	2,875	8,170



Greater Melbourne

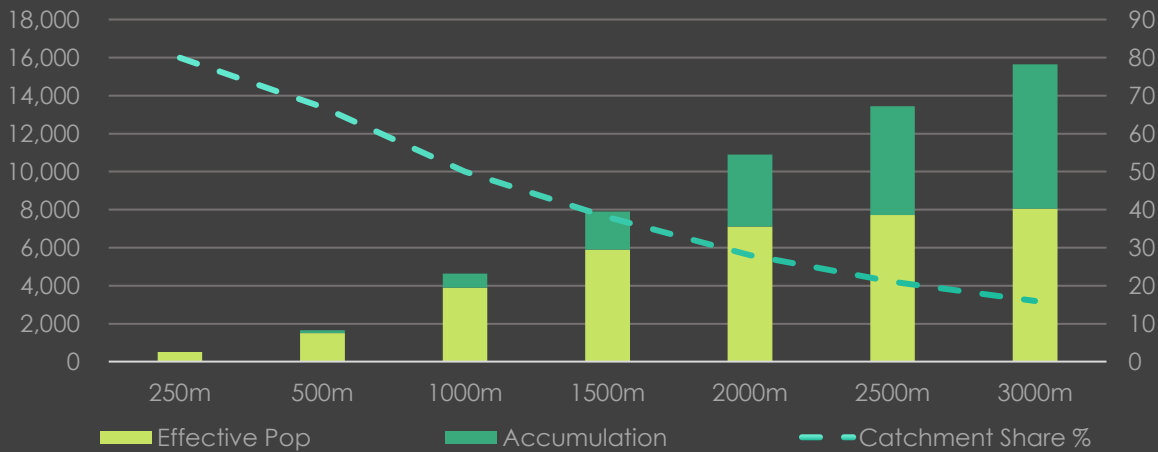
A total of 578 fitness centres were identified in Greater Melbourne while noticeable variance was observed in the average market composition among the region's SA4 subregions, with the effective (competition adjusted) population per fitness centre catchment assessed ranging from averages of 4,629 in the Melbourne - Inner region to 7,585 in Melbourne - West across an adopted 1.5km catchment range.

In comparison to the other metro regions analysed nationally, the effective population capture within the typical fitness centre catchment in Greater Melbourne was found to deviate at a fairly standard rate of 53.2% from the average level recorded across all of the region's fitness centre locations which results in most catchment effective population counts falling within the 2,800 to 9,000 range.

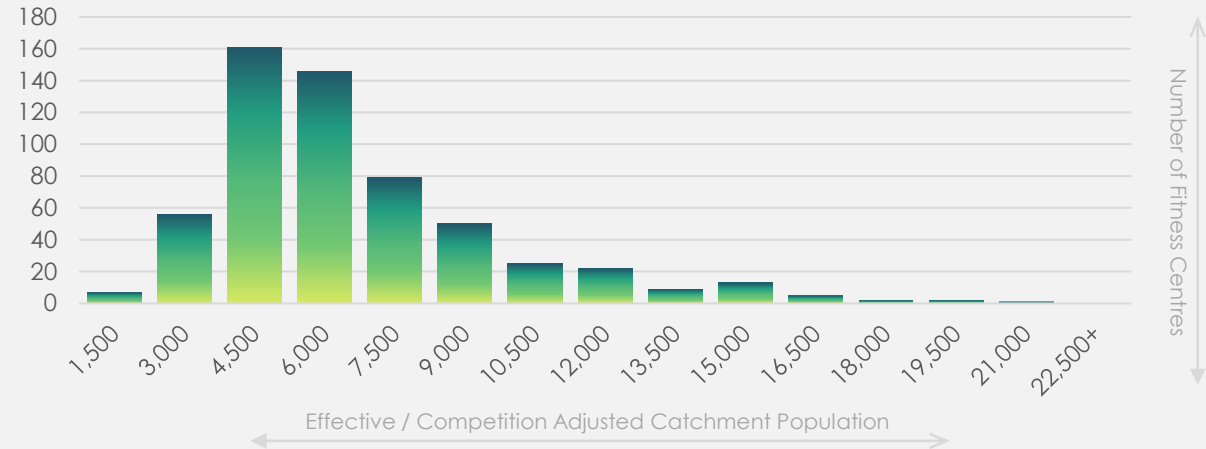


- Anytime Fitn.. - 103
- F45 - 87
- Body Fit Tra.. - 74
- Snap Fitness - 41
- Other - 273

Average Store Catchment Capture



Number of Stores By Effective Population Cohort



	Average 1.5km Catchment Metrics						
	Stores Assessed	Population Per Store	Population Count	Store Count	Effective Population	Std Deviation	Competition Dist. (m)
Inner	134	4,765	134,924	12.0	4,841	982	501
Inner East	57	6,692	80,375	6.0	6,737	3,011	807
Inner South	59	7,318	81,345	4.5	7,146	1,713	957
North East	63	8,835	53,966	3.8	7,899	2,482	1,393
North West	37	11,987	49,600	2.6	10,244	4,127	2,220
Outer East	57	9,170	50,501	3.7	7,740	2,670	1,143
South East	72	12,423	55,455	3.0	11,158	4,799	1,517
West	70	12,943	48,091	2.3	12,222	6,985	1,830
Mornington Peninsula	29	10,775	27,167	2.7	7,659	3,568	2,415



Regional Victoria

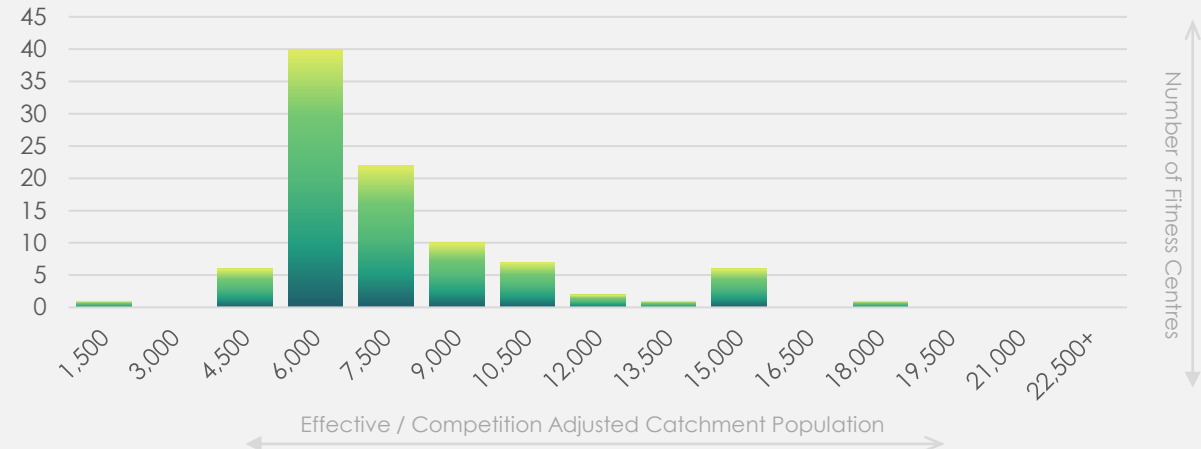
Our latest research has identified a total of 97 fitness centres in Regional Vic. and noticeable variance in the average market composition among the region's SA4 subregions, with the effective (competition adjusted) population per fitness centre catchment assessed ranging from averages of 5,561 in the Shepparton region to 8,691 in Warrnambool and South West across an adopted 3.0km catchment range.

In comparison to the other non-metro regions analysed nationally, the effective population capture within the typical fitness centre catchment in Regional Vic. was found to deviate at a fairly standard rate of 41.6% from the average level recorded across all of the region's fitness centre locations which results in the majority of catchment effective population counts falling within the 3,800 to 10,300 range.

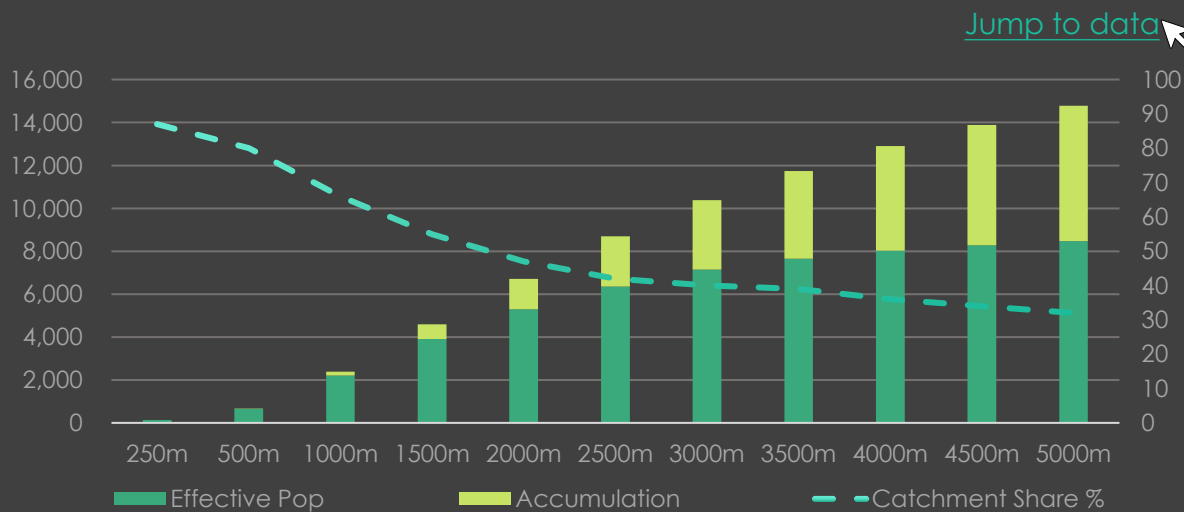


- Anytime Fitn.. - 26
- F45 - 18
- Body Fit Tra.. - 16
- Snap Fitness - 12
- Other - 25

Number of Stores By Effective Population Cohort



Average Store Catchment Capture



	Average 3km Catchment Metrics						
	Stores Assessed	Population Per Store	Population Count	Store Count	Effective Population	Std Deviation	Competition Dist. (m)
Ballarat	10	17,747	31,366	3.4	8,130	3,323	1,383
Bendigo	8	21,200	24,654	2.8	8,064	2,342	2,139
Geelong	34	9,926	31,045	2.8	7,469	4,240	2,532
Hume	11	16,958	16,813	1.6	5,857	1,527	12,106
Latrobe - Gippsland	11	27,719	15,664	2.1	6,349	3,768	11,078
North West	8	19,365	18,322	2.5	7,089	2,833	23,006
Shepparton	9	15,381	21,826	3.9	5,561	1,556	7,750
Warrnambool and South West	6	21,293	17,172	2.0	8,692	2,144	24,771



Greater Brisbane

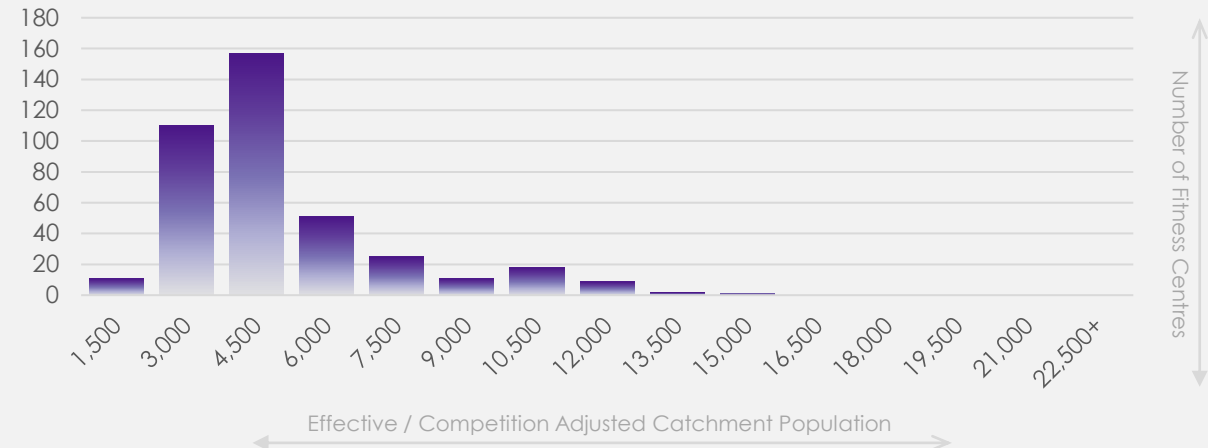
A total of 395 fitness centres were identified in Greater Brisbane while moderate variance was observed in the average market composition among the region's SA4 subregions, with the effective (competition adjusted) population per fitness centre catchment assessed ranging from averages of 3,474 in the Brisbane Inner City region to 5,349 in Brisbane - South across an adopted 1.5km catchment range.

In comparison to the other metro regions analysed nationally, the effective population capture within the typical fitness centre catchment in Greater Brisbane was found to deviate at a fairly standard rate of 53.6% from the average level recorded across all of the region's fitness centre locations resulting in the bulk of catchment effective population counts falling within the 2,000 to 6,600 range.

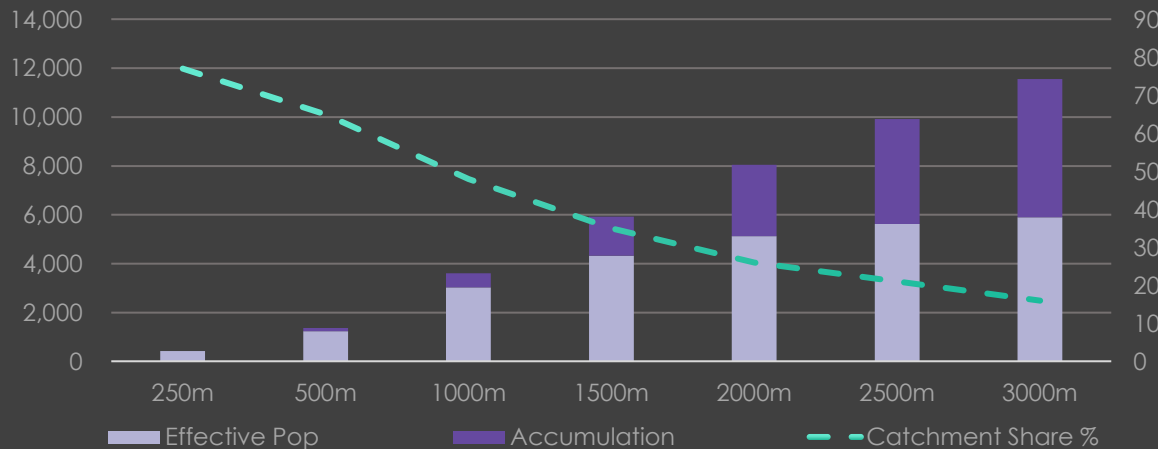


- F45 - 55
- Snap Fitness - 54
- Anytime Fitn.. - 52
- Fit Stop - 49
- Other - 185

Number of Stores By Effective Population Cohort



Average Store Catchment Capture



[Jump to data](#)

Average 1.5km Catchment Metrics

	Stores Assessed	Population Per Store	Population Count	Store Count	Effective Population	Std Deviation	Competition Dist. (m)
East	35	7,072	32,645	3.7	6,162	2,352	1,143
North	43	5,409	61,104	5.7	5,137	1,872	747
South	52	7,450	72,772	5.1	6,666	3,860	952
West	37	5,256	45,780	4.5	5,068	1,927	1,049
Inner City	89	3,472	107,774	10.6	3,668	329	518
Ipswich	40	9,809	29,975	3.1	7,707	3,628	1,775
Logan - Beaudesert	38	10,280	33,208	3.0	8,397	4,887	2,496
Moreton Bay - North	28	10,093	30,830	2.5	7,631	3,159	2,182
Moreton Bay - South	33	6,938	38,383	3.9	5,821	1,575	1,168



Regional Queensland

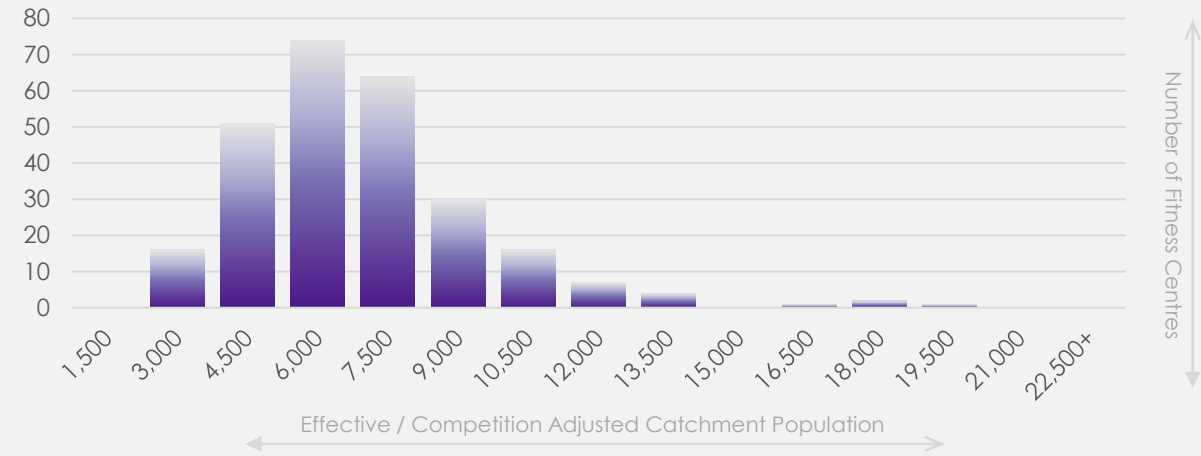
A total of 266 fitness centres were identified in Regional Qld while noticeable variance was observed in the average market composition among the region's SA4 subregions, with the effective (competition adjusted) population per fitness centre catchment assessed ranging from averages of 4,777 in the Sunshine Coast region to 8,586 in Darling Downs - Maranoa across an adopted 3.0km catchment range.

In comparison to the other non-metro regions analysed nationally, the effective population capture within the typical fitness centre catchment in Regional Qld was found to deviate at a fairly standard rate of 43.6% from the average level recorded across all of the region's fitness centre locations resulting in the bulk of catchment effective population counts falling within the 3,700 to 8,800 range.

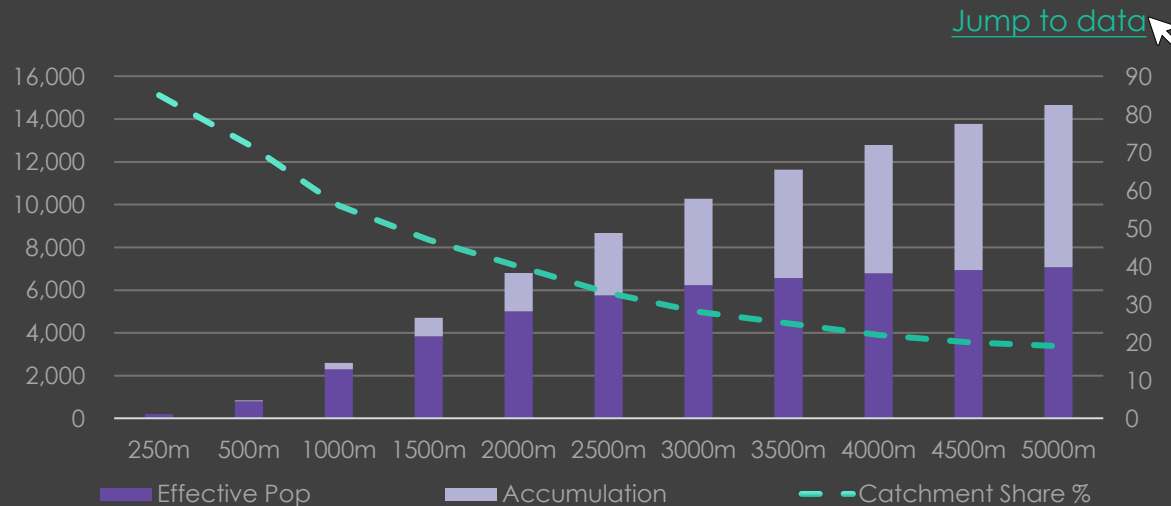


- F45 - 47
- Snap Fitness - 35
- Jetts - 31
- Fit Stop - 28
- Other - 125

Number of Stores By Effective Population Cohort



Average Store Catchment Capture



Average 3km Catchment Metrics

	Stores Assessed	Population Per Store	Population Count	Store Count	Effective Population	Std Deviation	Competition Dist. (m)
Cairns	20	13,147	23,407	2.5	6,657	3,313	2,016
Darling Downs - Maranoa	2	66,157	8,586	1.0	8,586	2,742	172,906
Central Queensland	17	13,939	18,760	2.2	7,313	3,441	27,566
Gold Coast	96	6,998	41,818	3.9	6,266	2,047	1,057
Mackay Isaac Whitsunday	8	23,434	19,314	2.5	7,920	2,664	14,228
Outback	3	27,391	11,492	1.7	6,596	3,605	429,889
Sunshine Coast	64	6,608	24,633	4.4	4,777	1,879	1,478
Toowoomba	13	12,965	40,156	4.1	7,706	1,443	1,622
Townsville	25	9,706	29,141	2.7	6,308	1,650	4,326
Wide Bay	18	17,834	19,493	2.7	7,426	4,316	8,216



Greater Perth

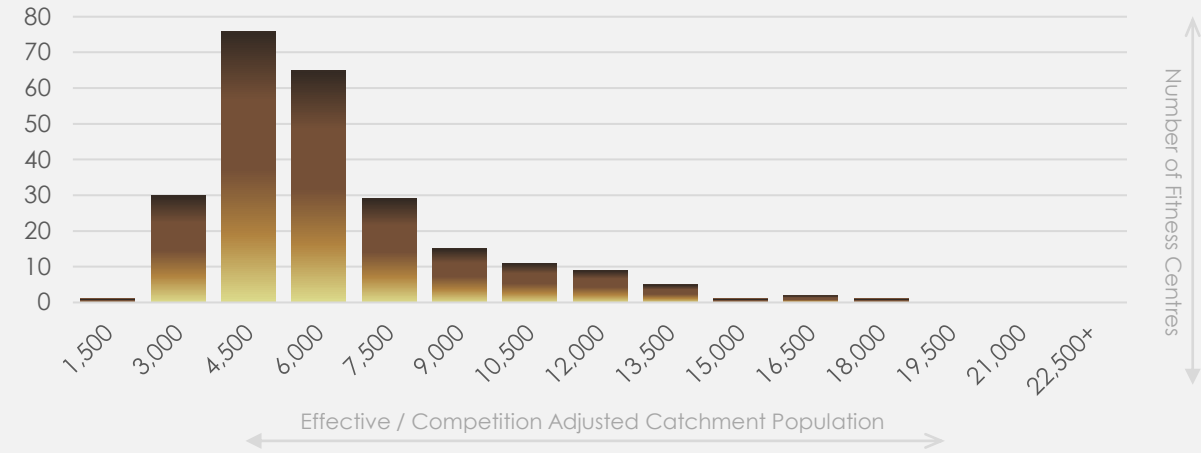
A total of 245 fitness centres were identified in Greater Perth while noticeable variance was observed in the average market composition among the region's SA4 subregions, with the effective (competition adjusted) population per fitness centre catchment assessed ranging from averages of 4,354 in the Perth - North East region to 7,050 in Perth - North West across an adopted 1.5km catchment range.

In comparison to the other metro regions analysed nationally, the effective population capture within the typical fitness centre catchment in Greater Perth was found to deviate to a lower extent (~ 50.9%) from the average level recorded across all of the region's fitness centre locations which results in the majority of catchment effective population counts falling within the 2,700 to 8,200 range.

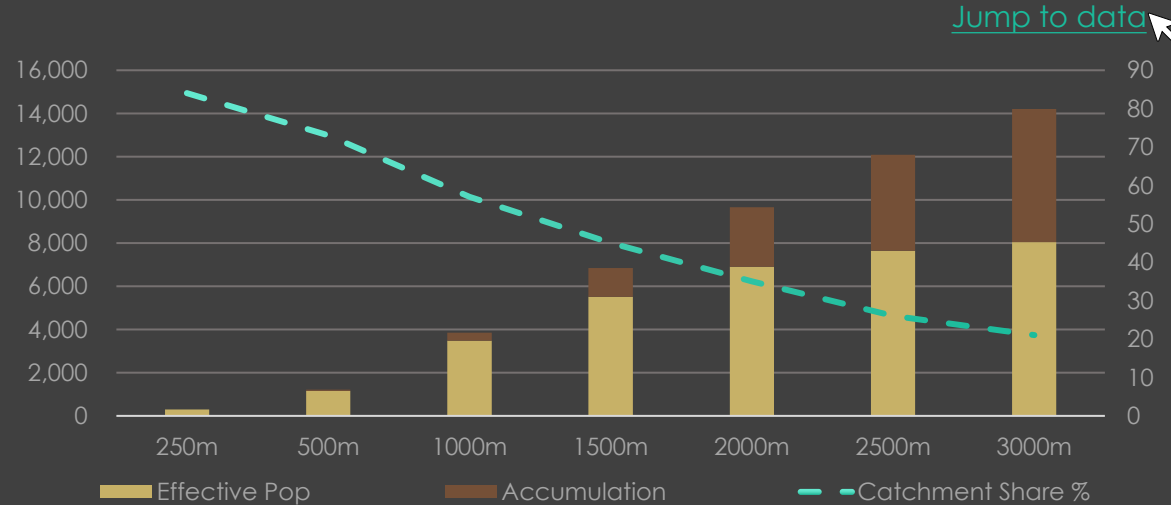


- F45 - 47
- Snap Fitness - 31
- Anytime Fitn.. - 31
- Plus Fitness - 29
- Other - 107

Number of Stores By Effective Population Cohort



Average Store Catchment Capture



[Jump to data](#)

	Average 1.5km Catchment Metrics						
	Stores Assessed	Population Per Store	Population Count	Store Count	Effective Population	Std Deviation	Competition Dist. (m)
Mandurah	11	10,485	18,514	1.4	8,031	4,322	4,431
Inner	38	5,057	64,514	5.9	5,416	1,740	782
North East	29	10,253	43,461	3.5	7,444	2,722	1,192
North West	58	10,450	48,166	2.9	9,797	4,353	1,663
South East	56	10,018	46,358	2.9	8,846	2,797	1,532
South West	53	8,911	40,155	4.0	7,513	3,231	1,212



Regional Western Australia

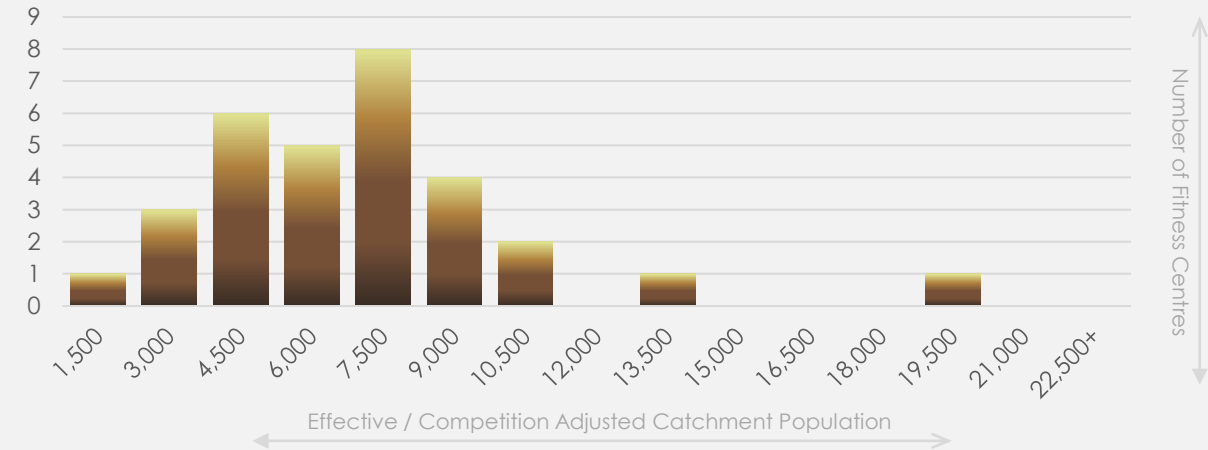
Our latest research has identified a total of 31 fitness centres in Regional WA and noticeable variance in the average market composition among the region's SA4 subregions, with the effective (competition adjusted) population per fitness centre catchment assessed ranging from averages of 5,447 in the Bunbury region to 7,764 in Western Australia - Wheat Belt across an adopted 3.0km catchment range. Please note the region's remoteness when assessing these results, as further investigation into factors such as customer travel distance and store size are likely to be helpful in fully understanding the uniqueness of each region and operation.

In comparison to the other non-metro regions analysed nationally, the effective population capture within the typical fitness centre catchment in Regional WA was found to deviate at a fairly standard rate of 41.5% from the average level recorded across all of the region's fitness centre locations which results in the bulk of catchment effective population counts falling within the 3,000 to 9,300 range.

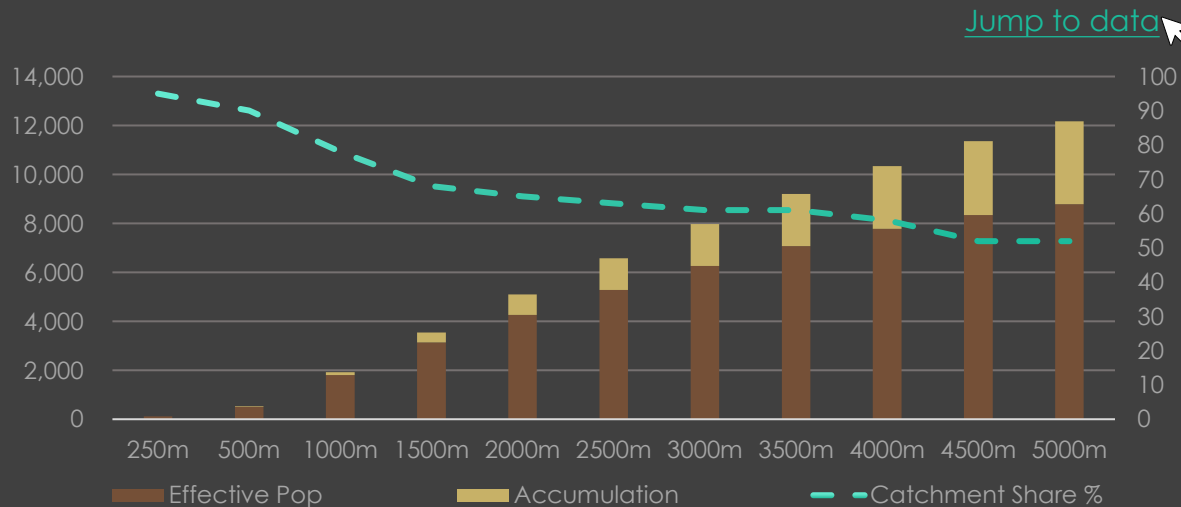


- F45 - 47
- Snap Fitness - 31
- Anytime Fitn.. - 31
- Plus Fitness - 29
- Other - 107

Number of Stores By Effective Population Cohort



Average Store Catchment Capture



	Average 3km Catchment Metrics					
	Stores Assessed	Population Per Store	Population Count	Store Count	Effective Population	Competition Dist. (m)
Bunbury	17	~5,447	12,942	2.7	~4,022	8,145
Wheat Belt	3	~7,764	16,162	1.7	~2,215	81,954
Outback North	4	~7,665	7,665	1.0	~3,199	454,390
Outback South	7	~14,196	14,196	2.1	~1,134	146,583



Greater Adelaide

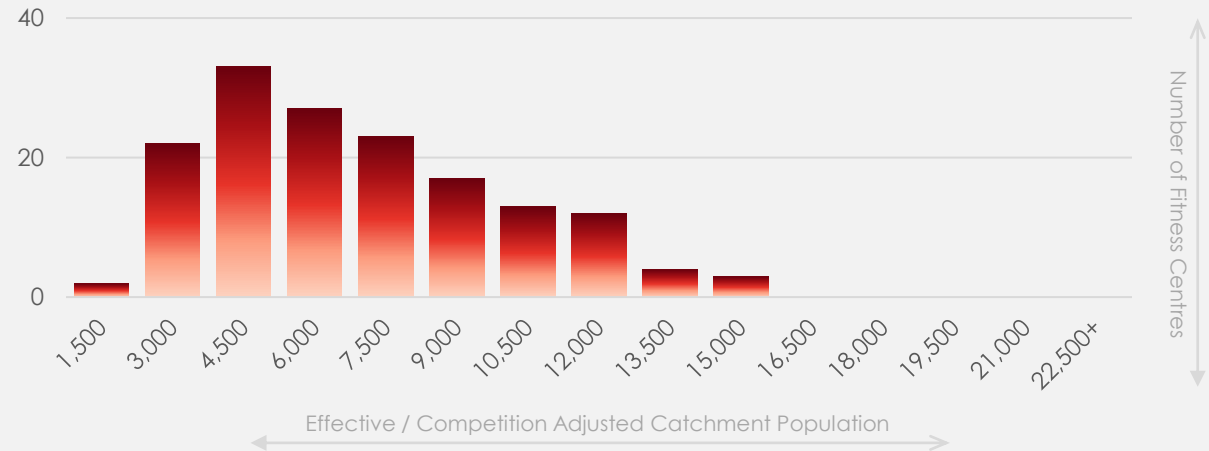
A total of 156 fitness centres were identified in Greater Adelaide while moderate variance was observed in the average market composition among the region's SA4 subregions, with the effective (competition adjusted) population per fitness centre catchment assessed ranging from averages of 5,242 in the Adelaide - Central and Hills region to 7,242 in Adelaide - North across an adopted 1.5km catchment range.

In comparison to the other metro regions analysed nationally, the effective population capture within the typical fitness centre catchment in Greater Adelaide was found to deviate to a lower extent (~ 49.7%) from the average level recorded across all of the region's fitness centre locations. This sees most catchment effective population counts falling within the 3,200 to 9,200 range.

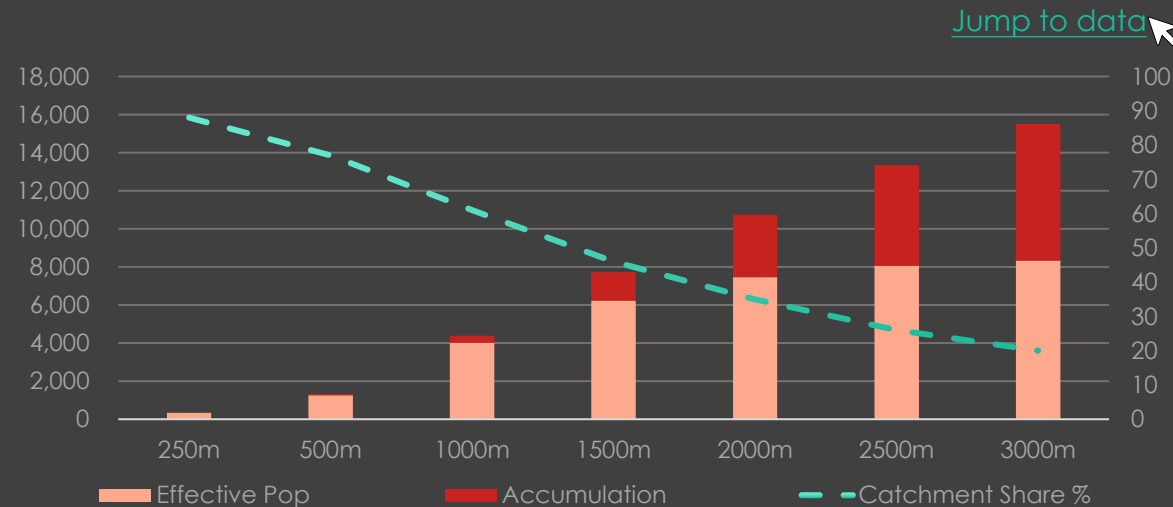


- Anytime Fitn.. - 43
- F45 - 23
- Zap Fitness - 17
- Body Fit Tra.. - 16
- Other - 57

Number of Stores By Effective Population Cohort



Average Store Catchment Capture



Average 1.5km Catchment Metrics

	Stores Assessed	Population Per Store	Population Count	Store Count	Effective Population	Std Deviation	Competition Dist. (m)
Central and Hills	46	6,982	57,059	3.6	6,117	2,326	1,436
North	42	11,257	44,886	2.5	10,717	3,997	1,648
South	42	9,125	43,770	3.1	8,483	3,067	1,693
West	26	9,669	54,070	3.3	8,127	2,340	1,221



Regional South Australia

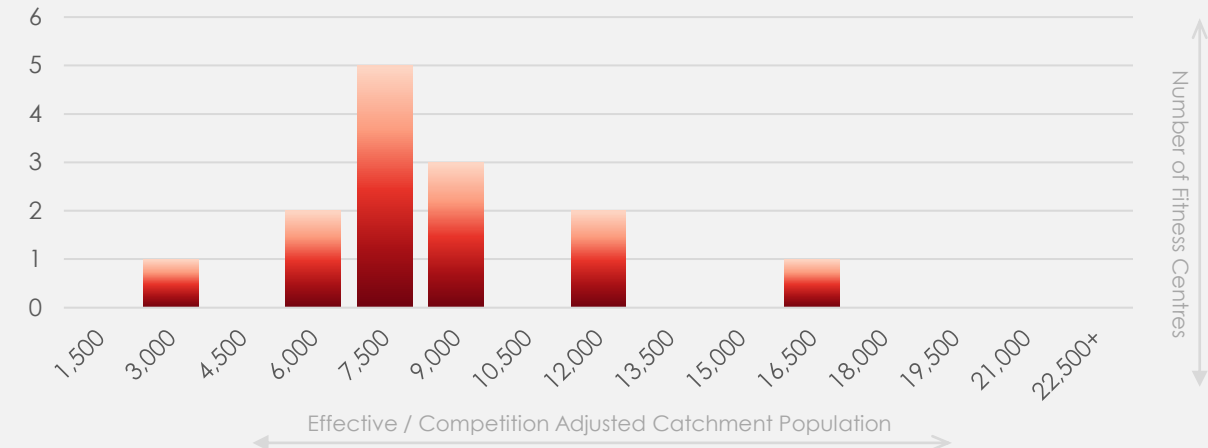
Our latest research has identified a total of 14 fitness centres in Regional SA and high variance in the average market composition among the region's SA4 subregions, with the effective (competition adjusted) population per fitness centre catchment assessed ranging from averages of 4,757 in the Barossa - Yorke - Mid North region to 8,997 in South Australia - Outback across an adopted 3.0km catchment range. The region's remoteness should be noted when assessing these results, however, with further investigation into factors such as typical customer travel trends recommended for determining the effective catchment range of specific operations.

In comparison to the other non-metro regions analysed nationally, the effective population capture within the typical fitness centre catchment in Regional SA was found to deviate to a lower extent (~ 39.0%) from the average level recorded across all of the region's fitness centre locations resulting in the majority of catchment effective population counts falling within the 5,000 to 10,700 range.



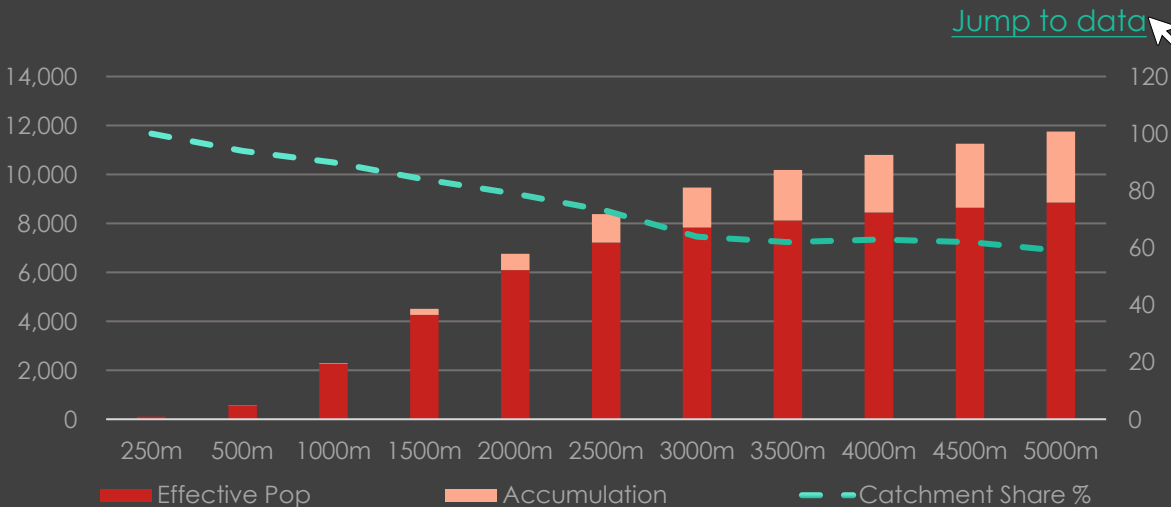
- Anytime Fitn.. - 6
- F45 - 4
- Snap Fitness - 2
- Body Fit Tra.. - 1
- Other - 1

Number of Stores By Effective Population Cohort



	Average 3km Catchment Metrics						
	Stores Assessed	Population Per Store	Population Count	Store Count	Effective Population	Std Deviation	Competition Dist. (m)
Barossa Yorke - Mid North	2	59,087	4,758	1.0	4,758	3,299	20,344
Outback	4	21,444	12,508	1.5	8,997	5,100	149,739
South East	8	25,081	15,343	1.5	8,027	1,831	40,570

Average Store Catchment Capture



Greater Hobart

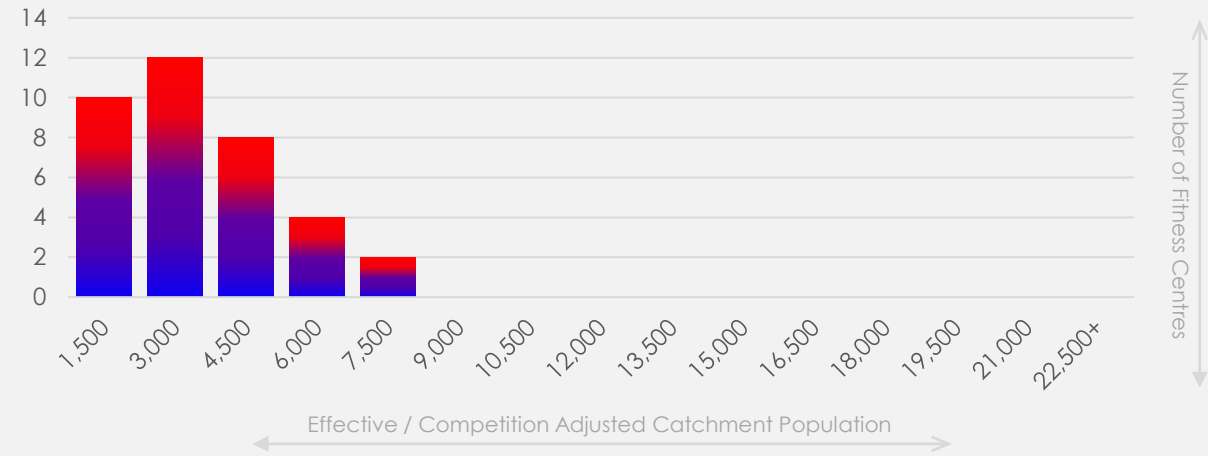
Though the small relative sample size should be noted, a total of 36 fitness centres were identified in Greater Hobart with significant variance observed in the average market composition among them and an effective (competition adjusted) population per fitness centre catchment ranging from 507 to 7,489 across an adopted 1.5km catchment range.

In comparison to the other metro regions analysed nationally, the effective population capture within the typical fitness centre catchment in Greater Hobart was found to deviate at a fairly standard rate of 60.5% from the average level recorded across all of its fitness centre locations resulting in the bulk of catchment effective population counts falling within the 1,200 to 4,600 range.



- Zap Fitness - 17
- Anytime Fitn.. - 5
- F45 - 5
- Body Fit Tra.. - 3
- Other - 6

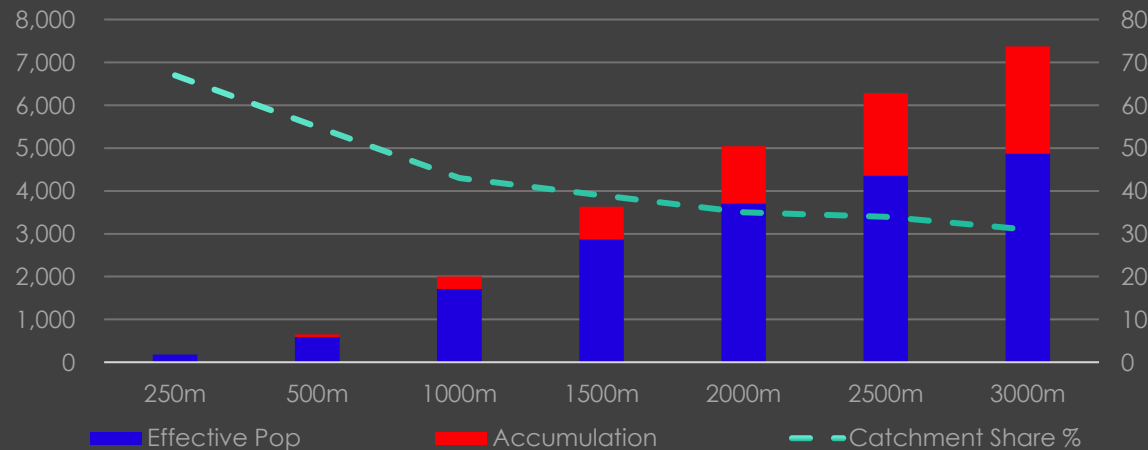
Number of Stores By Effective Population Cohort



	Average 1.5km Catchment Metrics						
	Stores Assessed	Population Per Store	Population Count	Store Count	Effective Population	Std Deviation	Competition Dist. (m)
Hobart	36	7,095	24,891	5.7	4,871	2,871	1,909

Average Store Catchment Capture

[Jump to data](#)



Regional Tasmania

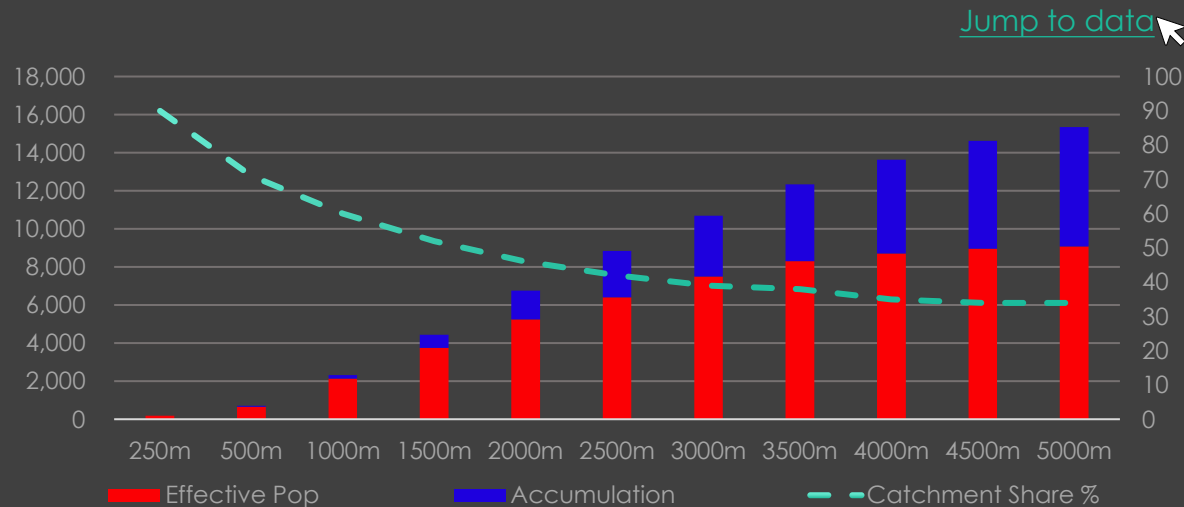
A total of 14 fitness centres were identified in Regional Tas. while noticeable variance was observed in the average market composition among the region's SA4 subregions, with the effective (competition adjusted) population per fitness centre catchment assessed ranging from averages of 6,509 in the West and North West region to 8,251 in Launceston and North East across an adopted 3.0km catchment range.

In comparison to the other non-metro regions analysed nationally, the effective population capture within the typical fitness centre catchment in Regional Tas. was found to deviate to a greater extent (~ 61.6%) from the average level recorded across all of the region's fitness centre locations which sees most catchment effective population counts falling within the 4,900 to 10,100 range.

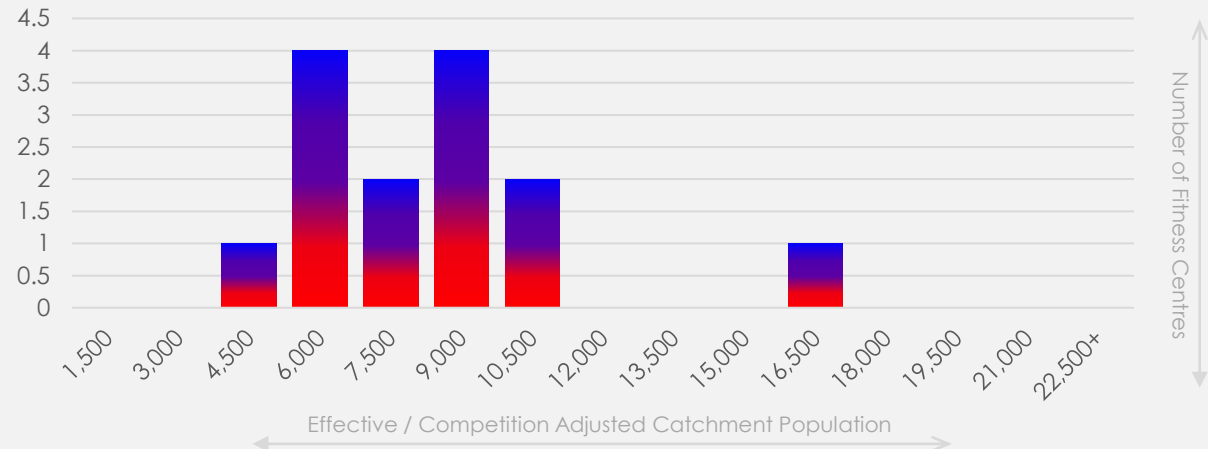


- Zap Fitness - 6
- Anytime Fitn.. - 3
- Body Fit Tra.. - 3
- F45 - 2

Average Store Catchment Capture



Number of Stores By Effective Population Cohort



	Stores Assessed	Population Per Store	Average 3km Catchment Metrics				
			Population Count	Store Count	Effective Population	Std Deviation	Competition Dist. (m)
Launceston and North East	8	19,634	27,928	2.8	8,252	3,658	1,387
South East	0	n/a	n/a	n/a	n/a	n/a	n/a
West and North West	6	20,135	17,937	3.0	6,510	1,613	13,730



Greater Darwin

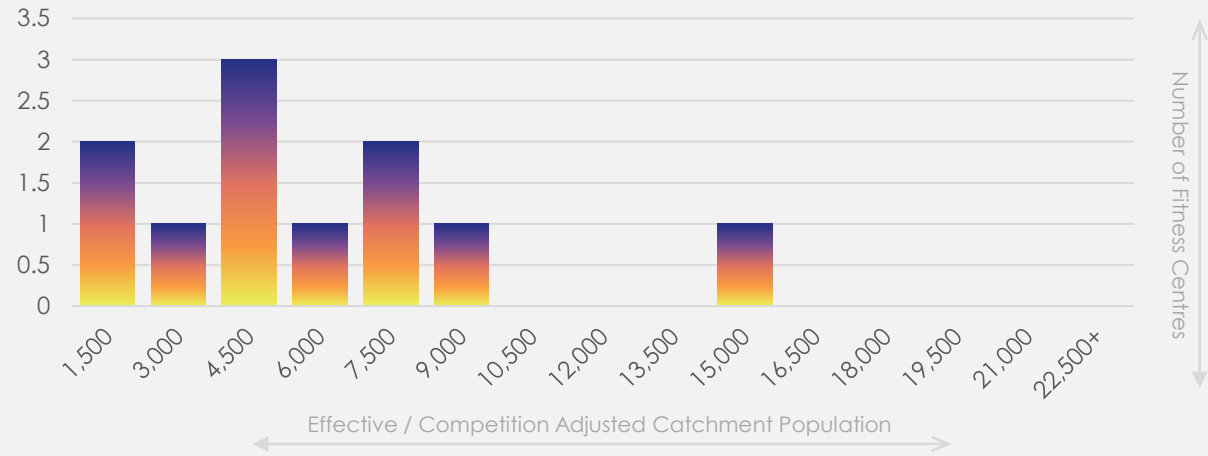
Though the small relative sample size should be noted, a total of 11 fitness centres were identified in Greater Darwin with significant variance observed in the average market composition among them and an effective (competition adjusted) population per fitness centre catchment ranging from 985 to 13,625 across an adopted 1.5km catchment range.

In comparison to the other metro regions analysed nationally, the effective population capture within the typical fitness centre catchment in Greater Darwin was found to deviate to a greater extent (~ 72.5%) from the average level recorded across all of its fitness centre locations with most catchment effective population counts falling within the 1,900 to 7,500 range.



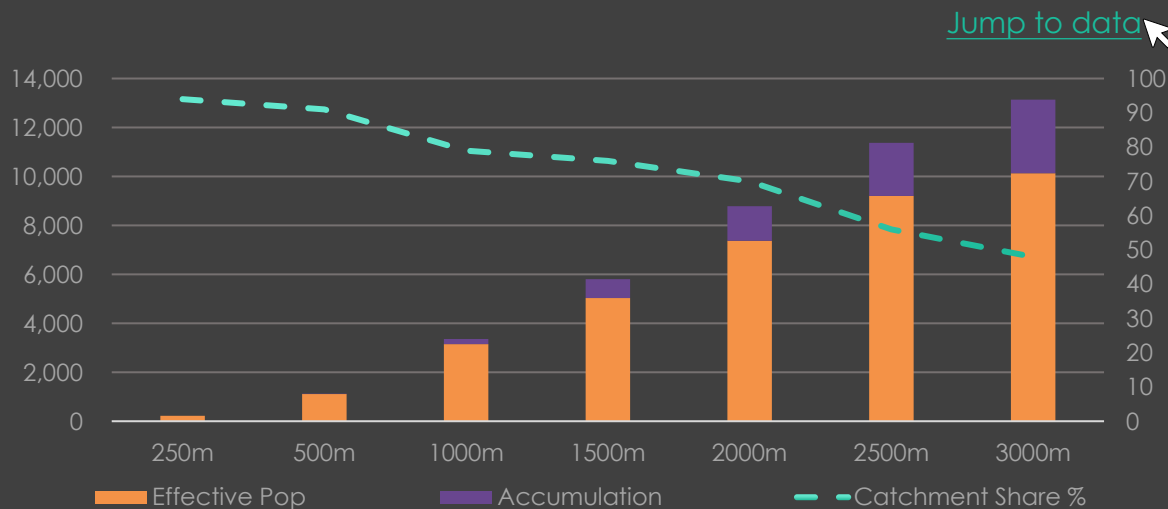
- Snap Fitness - 5
- F45 - 3
- Anytime Fit.. - 1
- Fernwood Fit.. - 1
- Other - 1

Number of Stores By Effective Population Cohort



	Average 1.5km Catchment Metrics						
	Stores Assessed	Population Per Store	Population Count	Store Count	Effective Population	Std Deviation	Competition Dist. (m)
Darwin	11	13,681	20,435	2.1	10,131	7,905	4,294

Average Store Catchment Capture



Australian Capital Territory

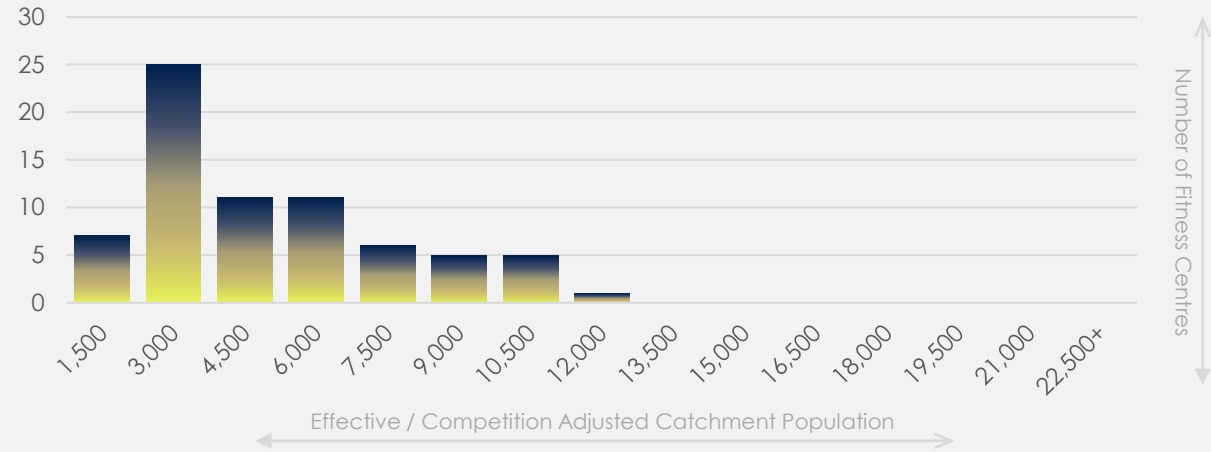
A total of 71 fitness centres were identified in Australian Capital Territory with significant variance observed in the average market composition among them and an effective (competition adjusted) population per fitness centre catchment ranging from 103 to 10,944 across an adopted 1.5km catchment range.

In comparison to the other metro regions analysed nationally, the effective population capture within the typical fitness centre catchment in Australian Capital Territory was found to deviate at a fairly standard rate of 61.5% from the average level recorded across all of its fitness centre locations which sees most catchment effective population counts falling within the 1,700 to 6,800 range.



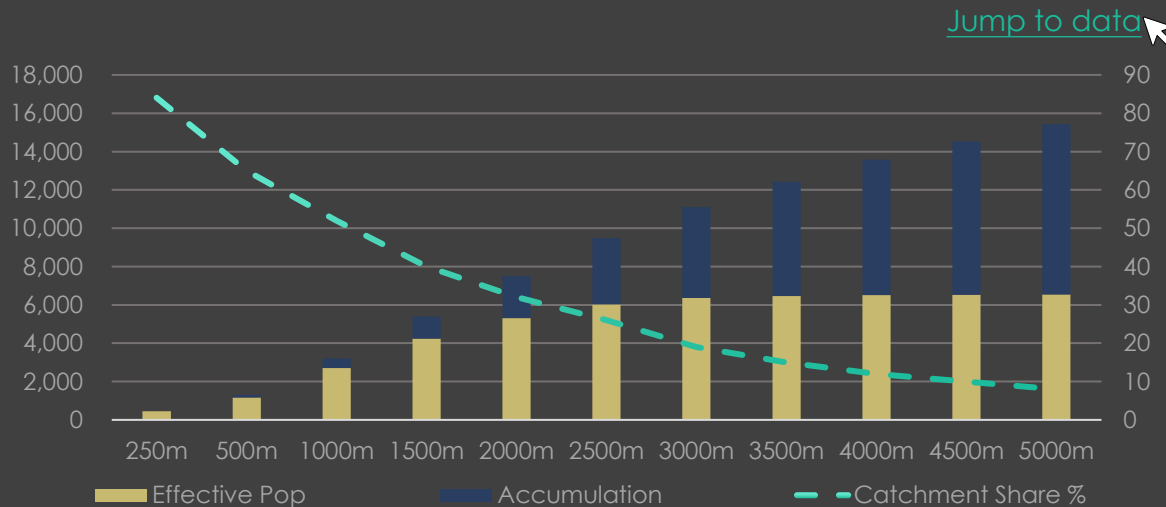
- Club Lime - 31
- Anytime Fitn.. - 15
- F45 - 6
- Studio Pilat.. - 4
- Other - 15

Number of Stores By Effective Population Cohort



	Average 1.5km Catchment Metrics						
	Stores Assessed	Population Per Store	Population Count	Store Count	Effective Population	Std Deviation	Competition Dist. (m)
Australian Capital Territory	71	6,500	35,262	4.4	6,364	3,375	1,245

Average Store Catchment Capture



Sector Coverage

Retail

Our retail sector coverage combines major brand analysis of over 290 retailers encompassing over 180,000 individual locations across 20 categories cross-referencing the catchment of each against its peers and over 14 million addresses in Australia. Further, with the ability to draw on our extensive demographic datasets, we can undertake income and expenditure analysis instantly to enable detailed site assessments and reports in minutes. Retail is far more nuanced than simply counting stores and populations, which is where our 'concentrics' methodology has helped our clients consistently outperform the broader market by instantly highlighting threats and opportunities often missed by their peers.

Aged Care / Retirement / NDIS

Guaranteed to be one of the fastest growing sectors in coming years, AreaSearch's Aged Care coverage captures every aged care facility in Australia cross-referencing this with current demographic data on senior populations. This enables our clients to pinpoint high-demand regions, understand facility saturation, and make informed decisions regarding site acquisition and development to best service community needs.

Additionally, with the integration of our demographic, community health and medical datasets, our system instantly provides a gauge of services, amenity and spending likely to influence aged care choices. NDIS needs analysis are also covered, thereby assisting developers and service providers best meet the needs of the market now and into the future.

Medical

The medical sector is a complex web of services and providers, and AreaSearch's coverage here is no less comprehensive. We provide analyses of medical facilities ranging from general practitioners to specialized clinics, hospitals, and more. By cross-referencing these facilities with the latest health demographics, spending trends, proximity averages, hospital procedures and waiting times we empower our clients to anticipate service holes and healthcare demands.

In addition, our platform enables users to draw on extensive health expenditure datasets, giving insights into potential revenue and profitability for different medical services within specific regions. Whether for primary care clinics or specialized medical centers, our data aids in strategic site selection and has helped some of Australia's largest institutions raise hundreds of millions for investment in arguably Australia's most critical sector.

Child Care

Site selection is paramount in child care, but with many opportunities arising in the sector undertaking a detailed assessment and capitalizing on the best, while quickly dismissing the vast bulk of others is challenging.

By combing all the latest child care information across the sector coupled with instant school and competitor proximity analysis we have seen some clients assess over 25 sites in detail each day, with this rigorous approach helping them achieve top percentile performance in their tenancy and investment performance on many occasions.

Want Deals, not Data?

You're not alone there. Coupling our unique opportunity identification techniques with strong relationships across the tenant, developer and agent spectrums we are in a unique position to help clients on all sides of a deal that may otherwise go unseen. Reach out if you would like to be included in this process.

Disclaimer

1.1 Whilst AreaSearch have no reason to believe that any information contained in this report is inaccurate, we do not warrant the accuracy, adequacy or completeness of such information, nor do we undertake to keep the included data updated at a particular frequency.

1.2 The data provided within this report stems from third parties and could be sourced directly by yourself. AreaSearch provides convenient access to information and analysis as opposed to raw data.

1.3 A physical inspection has not been carried out by AreaSearch of the area or property detailed in this report to verify or adjust information provided.

1.4 The majority of data provided by AreaSearch stems from Government sources, but may differ from original data due to AreaSearch's methods of analysis. Estimates provided in this report are generated using AreaSearch's SA2 and SA3 aggregation techniques, which involve working data back to local levels based on population weightings within larger areas.

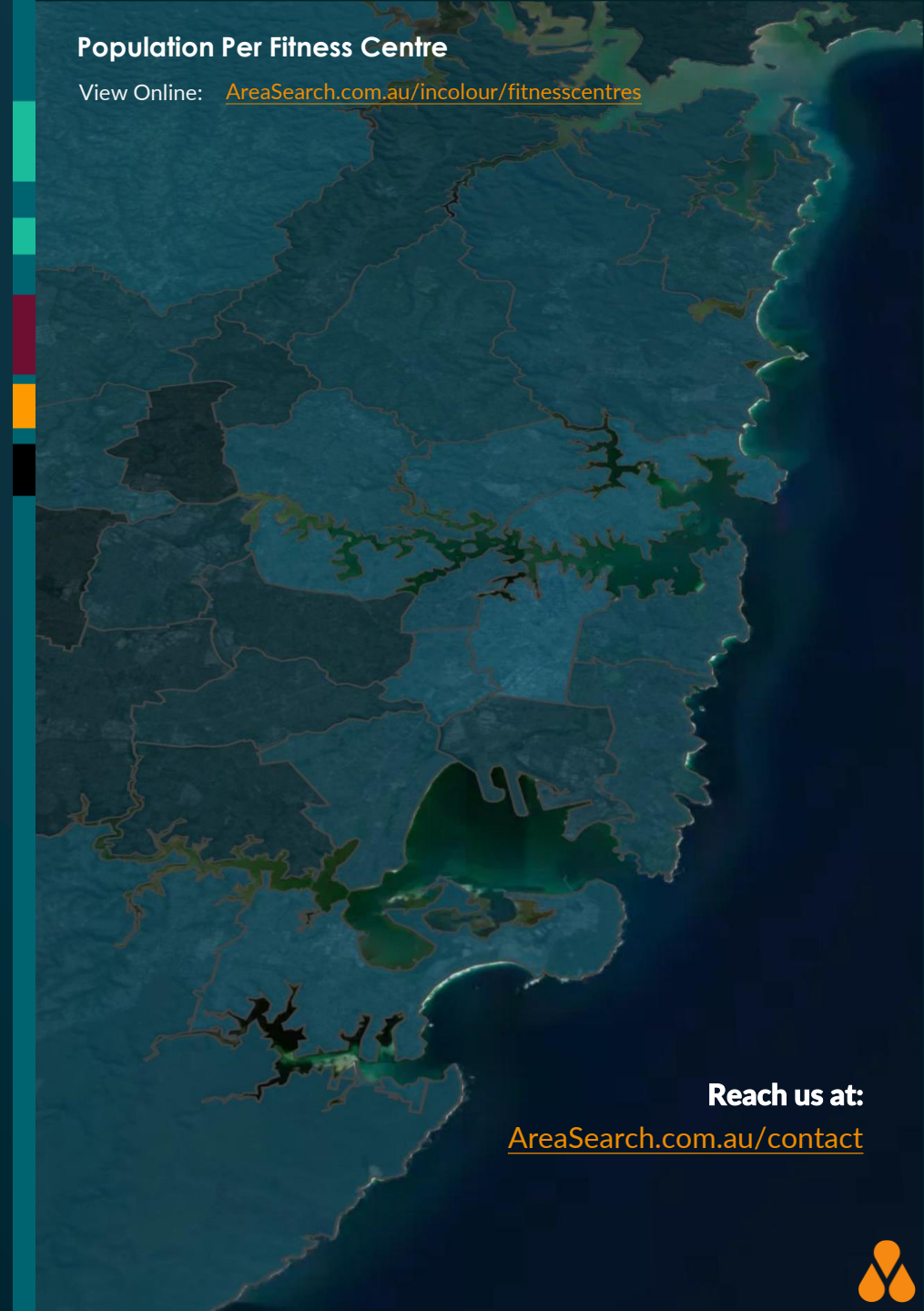
1.5 All information provided by AreaSearch is provided in good faith. However, this report should be viewed as a preliminary scoping tool and not a complete or decisive call to action. You should make your own inquiries and seek independent advice from relevant industry professionals before acting or relying on any information or material which is made available to you pursuant to our service.

1.6 We do not accept responsibility for loss suffered as a result of reliance by you upon the accuracy or currency of information contained in this report.

1.7 You agree to use our information service for lawful purposes only.

Population Per Fitness Centre

View Online: AreaSearch.com.au/incolour/fitnesscentres



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