

David Lloyd
— CLUBS —

Economic and Social Impact

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Economic and Social Impact

LICHFIELDS

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David Lloyd Leisure: Europe's Leading Health and Wellness Group

David Lloyd Leisure Ltd (DLL) is Europe's premier health, fitness and wellness provider.

This document will highlight the benefits of a David Lloyd Club in social and economic terms, whilst also bringing awareness to areas of planning policy that, with revision, could accelerate the delivery of these benefits through new David Lloyd Clubs.



The company has operated for over 40 years in the UK and Europe, but its home remains firmly rooted in the UK. In recent years member numbers and attendance has increased to record levels – indicating a strong demand for health and wellness facilities that has led DLL to identify circa 100 UK locations for growth.

One of the biggest challenges faced by the business, in fulfilling its growth ambitions is its planning typology: deemed a 'town centre' use. The very ethos of a David Lloyd Club is to replicate a 'country club' experience, with external areas set out in a landscaped setting, blending with the main club and interior health and fitness, sports, swimming and wellbeing and spa provision. It is clearly unsuited to a town centre location which is generally recognised.

However, its redefinition within the Commercial, Business and Service Uses of Class 'E', but outside those 'traditional' employment classifications,

means that provision for a David Lloyd Club (or equivalent) is rarely recognised in Local Plans. This severely limits 'plan-led' opportunities for development of a club.

An additional factor limiting growth potential is the slow speed in obtaining planning decisions.

DLL is both a key economic use and a very significant employer in the health and fitness market, employing around 13,700 people across the UK. Pay exceeds the national living wage, and staff benefit from a range of employee benefits.

DLL can and does contribute significantly to economic growth and personal wellbeing within an area, as this review sets out in the following sections.

Planning Policy Context

The overarching purpose of the planning system is to contribute towards the achievement of sustainable development. At a very high level, achieving 'sustainable development' means meeting today's needs without compromising the ability of future generations to meet their own needs.

The National Planning Policy Framework (NPPF) sets out the Government's policies for achieving sustainable development through three overarching objectives:

a) Economic – to (inter alia) help build a strong, responsive and competitive economy, by ensuring sufficient land of the right type, in the right places and at the right time is available to support growth, market innovation and improved productivity;

b) Social – to (inter alia) support strong, vibrant and healthy communities, with accessible services that reflect current and future needs and support communities' health, social and cultural well-being; and

c) Environmental – to (inter alia) protect and enhance the natural, built and historic environment; including making effective use of land, improving biodiversity, and mitigating and adapting to climate change, including moving to a low carbon economy.



The key challenges we experience in seeking appropriate sites are:

1. David Lloyd Clubs are characterised as a 'town centre use' yet very rarely do local plans and other key planning documents consider the capacity / need for large, format-based mixed-use health, fitness and wellbeing centres of the nature and scope of our Clubs;
2. Whilst an economic use, a David Lloyd Club is not classified as an employment use which sometimes limits our opportunities to deliver on allocated employment sites;
3. On many sites, notably at edge of urban area locations, we are often 'priced out' by higher value uses, notably housing.



Nevertheless, the development of a David Lloyd Club contributes to the principles of sustainable development, as outlined in the following paragraphs:

Economic

We are a significant employer in the health and fitness market, directly employing 13,700 people across the UK in a range of roles and business functions.

Each new development represents a major investment by us within the area, with the creation of approximately 75 Full-Time Equivalent (FTE) operational jobs, with opportunities in Food & Beverage, Kids & Creche, Lifeguarding, Gym & Fitness, Reception, Sales & Administration and Leadership. In addition, **every new FTE job we create supports an additional 0.59 FTE jobs in UK businesses in our supply chain and the wider economy.**

Pay exceeds the national living wage, and team members benefit from a range of initiatives to help support their work-life balance and wellbeing. These include flexible working, free family membership and access to 40 apprenticeship programmes.

The total economic contribution of developing a new club is estimated to be £3.3 million annually.

Social

We support our members to exercise regularly, delivering 800,000 fitness classes to our 615,000 members in 2023. In doing so, we make a significant contribution to Government's aim of easing pressure on the NHS. We also recognise the importance of encouraging children to develop healthy habits and a love of sport and exercise and **an estimated 25% of all our members are children under 16.**

The COVID-19 pandemic brought into sharp focus the need for both physical and mental resilience and we are at the forefront of development, both in fitness innovation across our Clubs, and mindful-wellness through group exercise classes and spas, and our family-focused provision.

As well as a comprehensive choice of facilities and group-exercise classes we place a strong emphasis on creating inclusive communities and supporting the emotional wellbeing of members and staff through social activities such as family discos, quiz nights and coffee mornings.

Each of our Clubs is embedded within the local community, providing schools with access to our pools and facilities and supporting local charities and good causes. **In 2024 we contributed a total of £2.7 million to support 1,200 different charities.** This included £1.5 million raised through Club fundraising with 76% benefitting local causes.

Environmental

We consider the location of new Clubs carefully. Coupled with our family-focused provision, this helps to support sustainable commuting patterns. **73% of our permanent team members live within 5 miles of their place of work**, whilst 50% of all club attendees visit as a family group.

In addition, the design of our clubs is very intentional, incorporating a wide variety of facilities with a focus on user experience whilst also considering the amount of raw materials used in construction and the energy consumed during operation. The format of each Club has been refined over time to ensure clubs are both efficiently constructed and run, to avoid surplus space and associated inefficiencies with respect to materials, heating and lighting.

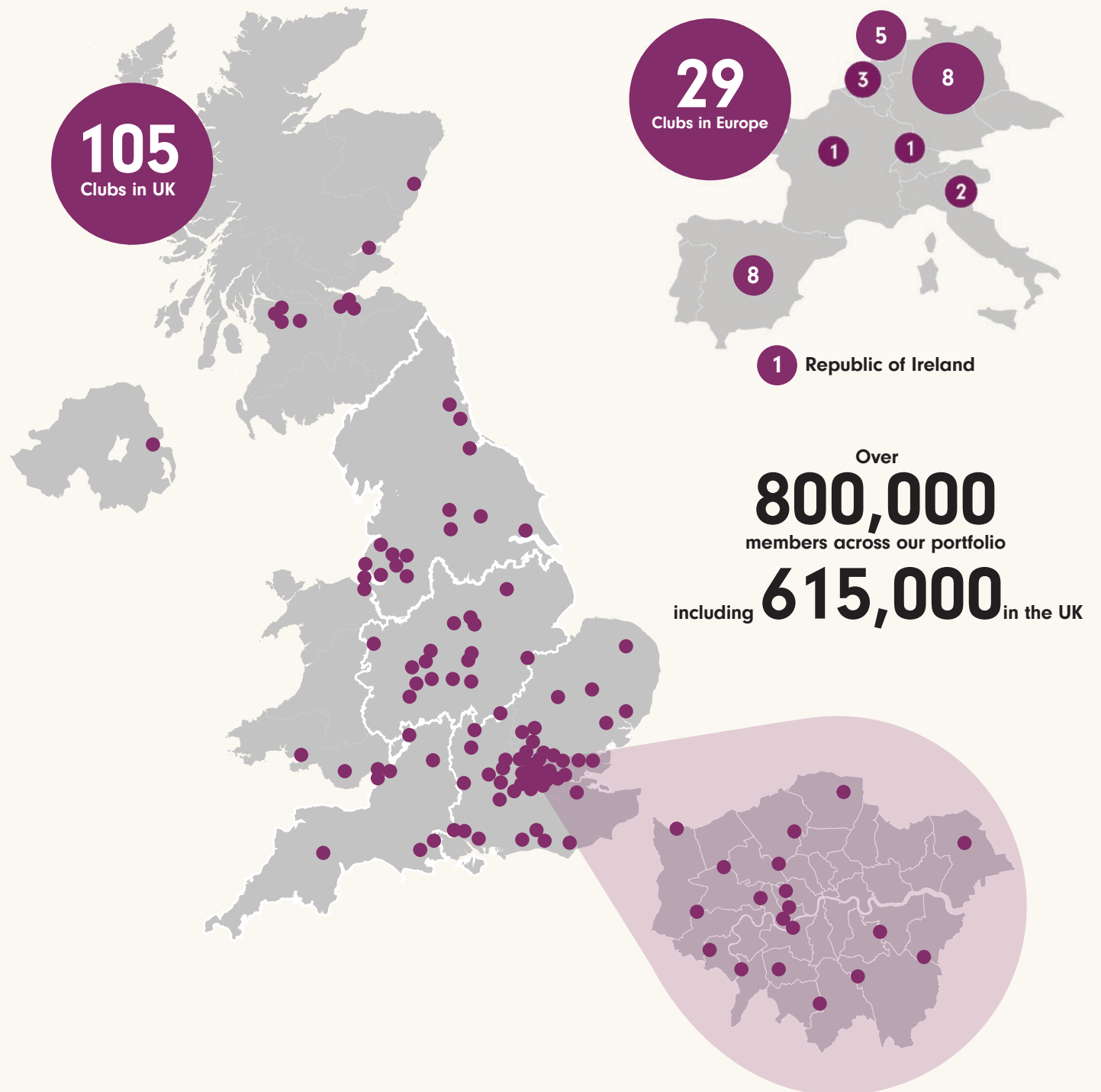
DLL has set a target of becoming carbon net zero by 2030, 20 years ahead of the current UK target. As part of this, we have established five key areas which will help to deliver this goal and are making changes including generating renewable energy on site, reducing indirect emissions in the supply chain, reducing overall water and energy on site, using sustainable modes of transport and reducing plastics and waste.



1

Introduction

Since opening our first club in Heston, Middlesex in 1982, David Lloyd Leisure Ltd (DLL) has grown to become Europe's leading premium health, fitness, and wellness group. We currently have 105 Clubs across the UK, with a presence in each region, making us a consistent, longterm investor at a national level. Elsewhere in Europe, we have a further 29 Clubs, including sites in Belgium, France, Germany, Ireland, Italy, The Netherlands, Spain and Switzerland.



This growth has driven an increase in the scale of employment opportunities and economic output supported by DLL. **We have over 800,000 members across Europe, including 615,000 in the UK.**

Our contribution to the national economy extends beyond the metrics presented in this document. By supporting our members to lead active, healthy lives we also help them to be more productive in their own jobs¹ and can help to reduce pressure on –and expenditure by – the NHS².

We work hard to embed each DLL Club within the local community. To our members, our Clubs are a place to socialise, relax, spend quality time with their family and – with many Clubs including dedicated workstations – even a place where they can make productive use of their time before and after workouts.

The design of our Clubs is very intentional; with a focus on member experience whilst also considering the amount of raw materials used in construction and the amount of energy needed during operation.

Looking to the future, we believe that the market conditions are in place to support further growth. The number of UK residents with a health Club membership has increased in recent years³. This has been driven by the shift towards a more health-conscious society; the additional flexibility offered by hybrid working; and the emergence of wearable technology. DLL analysis identifies 100 towns and cities across the UK that have an under-provision of premium health and wellness facilities. We are committed to expanding our portfolio and continuing to innovate.

DLL commissioned Lichfields to assess the breadth and depth of our economic and social contribution at a UK level.⁴ The results of the exercise show that our Clubs make a significant contribution to the national economy.⁵



¹ Source: <https://enterprise.fitbit.com/blog/the-link-between-fitness-and-job-performance-and-how-you-can-take-action-today/>

² Source: <https://www.gov.uk/government/publications/physical-activity-applying-all-our-health/physical-activity-applying-all-our-health>

³ Source: Leisure Property Forum: The Gym Sector, OC&C Strategy Consultants (2024)

⁴ Lichfields is the pre-eminent planning and economics consultancy in the UK and regularly advises clients and industry bodies on their economic and social impact.

⁵ Data relates to the 2023 calendar year, unless otherwise specified, and has been collected for DLL operations in the UK only.



Benefits and Advantages of a David Lloyd Club

Making a Difference to the National Economy

Established in 1982, David Lloyd Leisure (DLL) has grown to become Europe's leading premium health, fitness and wellness group. We currently have 105 Clubs and 615,000 members across the UK, with a further 29 Clubs elsewhere in Europe.

In 2023, our activity contributed an estimated **£344 million in Gross Value Added to the UK economy** and supported **12,600 Full-Time Equivalent (FTE) jobs**. This included 7,900 FTE jobs in DLL Clubs and offices, with the remaining jobs supported in our supply chain and the wider economy.

We also generated **£1.4 billion (net) in social value at the UK level during the same period**. This reflects the role we play in encouraging Club members to lead physically active lives, as well as our commitment to: learning and development; supporting charities and other good causes; and creating supply chain opportunities for micro enterprises.

Making a Difference to our Member's Lives

2023 we delivered 800,000 fitness classes across the UK, attended by our 615,000 members. We recognise the importance of supporting children to develop healthy habits and a love of sport and exercise and an estimated **25% of all DLL members are children under 16**. In addition, we teach 25,500 children to swim and 16,600 to play tennis each week.

Approximately 50% of all Club attendees visit as a family group.

By supporting our members to exercise regularly, we make a significant contribution to Government's aim of easing pressure on the NHS. Research⁶ suggests that **active lifestyles save the NHS £540 million annually** in reduced GP visits and a further £780 million in reduced demand for mental health services.

⁶ Source: <https://www.ukactive.com/blog/theres-a-solution-to-our-health-crisis-already-contributing-100bn-and-its-a-long-term-fix/>

Making a Difference to our Team Members

Our team members are at the heart of everything we do. We recognise this and want everyone to have the opportunity to: achieve their potential; belong; and have positive wellbeing. We are committed to promoting Diversity, Equity and Inclusion and have achieved Silver Accreditation from the WiHTL for our work in this area.

We support learning and development through a range of initiatives, including our apprenticeship programme. This offers 40 different courses ranging from Level 2 to Level 7. Since the Apprenticeship Levy was introduced (in 2017) 990 team members have enrolled on the programme, with 620 achievers recorded to date.

The impact of our approach is clear. In 2023, we were listed by The Sunday Times as a Top 10 Very Big Place to Work for.

Making a Difference to our Supply Chain

Our total expenditure with UK-based supply chain businesses totalled £374 million in 2023. We partner with thousands of businesses – of all sizes and across a variety of sectors – helping to drive growth across the UK economy.

We have developed strong, long-term relationships with many businesses in our supply chain. Coupled with the pace at which we have increased the number of DLL Clubs and members, as well as our national coverage/profile, this has provided a strong platform for the growth of many key suppliers.

Investing for the Future

Looking to the future, we believe that the market conditions are in place to support further growth, with our analysis identifying 100 towns and cities across the UK that fit our target demographic and have an under-provision of premium health and wellness facilities.

In response to the scale of opportunity, we expect to deliver a capital expenditure programme worth almost £1.3 billion across the UK between 2025 and 2030. This will focus on the delivery of new sites and refurbishment projects within our existing estate. This is an exciting time for the business and our planned investment will allow us to increase the economic value we generate at a national level.



2 Making a Difference to the Nation

With 105 Clubs across the UK, DLL makes an important contribution to the economy at a national and local level.



Employment

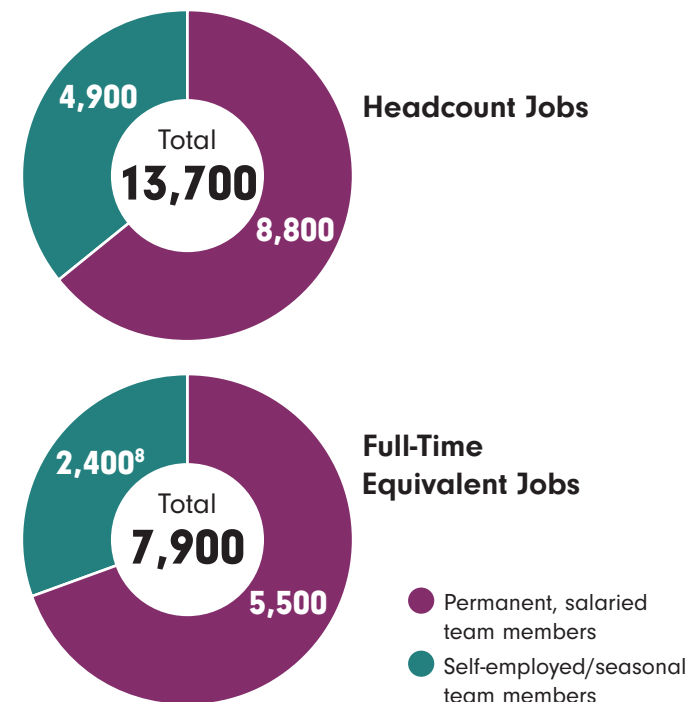
Direct Employment

We supported 13,700 direct headcount jobs (on average) across the UK during 2023. This corresponds to 5.3% of all employment supported by sports clubs and fitness facilities⁷ across Great Britain.

Having regard to the proportion of full-time and part-time workers, **we estimate that these direct headcount jobs translate to approximately 7,900 direct Full-Time Equivalent (FTE) jobs.**

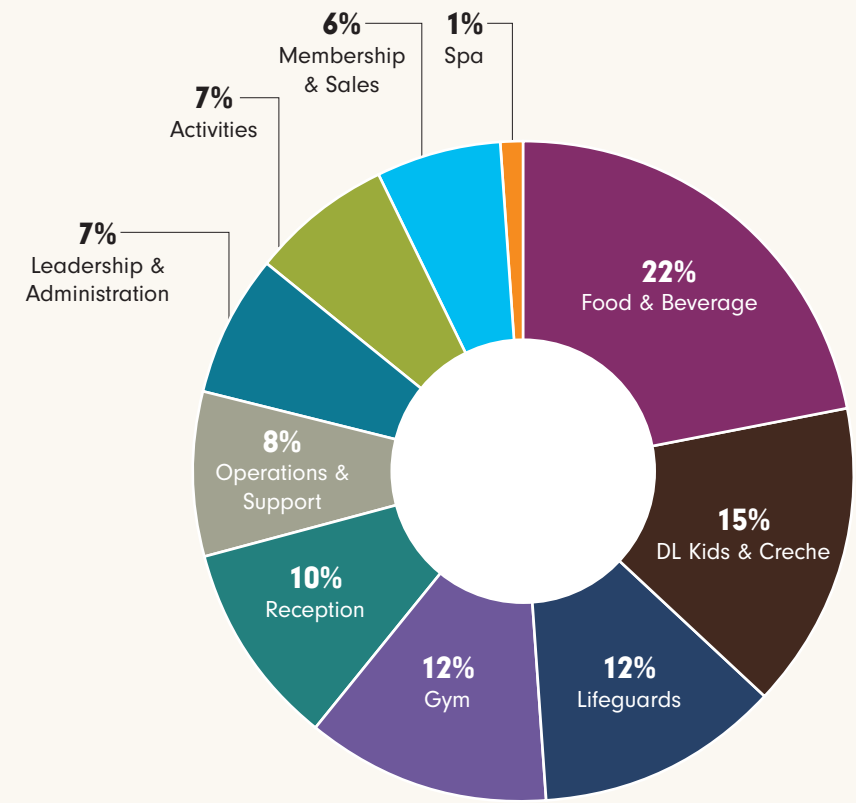
⁷ SIC Codes 93.120 and 93.130

⁸ Estimate, generated by Lichfields, assumes that all self-employed/seasonal roles are part-time. The number is likely to fluctuate throughout the year to reflect seasonal variations in demand



The jobs supported by DLL span a variety of different roles and business functions (see chart below). This reflects an offer which extends far beyond that of a typical gym, providing employment opportunities for people with a broad range of skills and qualifications.

Share of Club-Level Employment by Role (%)



Labour Catchment
More than half (58%) of all permanent Club team members⁹ live within a 3-mile radius of their place of work, rising to almost three-quarters (73%) within a 5-mile radius. This means that many of the opportunities are “local jobs for local people”.

Total Employment
Allowing for the ‘multiplier’ effects supported in the supply chain and wider economy, it is estimated that **DLL supports a total of 12,600 FTE jobs across the UK**. This includes:

7,900 direct FTE jobs;

3,700 indirect FTE jobs supported in UK businesses within our supply chain; and

1,000 induced FTE jobs due to wage expenditure by team members and workers in the supply chain.

7,900
Direct FTE jobs

3,700
Indirect FTE jobs

1,000
Induced FTE jobs

⁹ No data available for self-employed/seasonal workers

Wages

At DLL, we make sure our pay is highly competitive, exceeding the National Living Wage.

In 2023, we paid £152 million in wages to permanent, salaried team members, as well as a further £11 million and £15 million in National Insurance and PAYE contributions respectively.

Economic Output

In 2023, DLL contributed an estimated £344 million in Gross Value Added (GVA) to the UK economy. GVA is the value of output generated by a business or industry minus the costs of production.

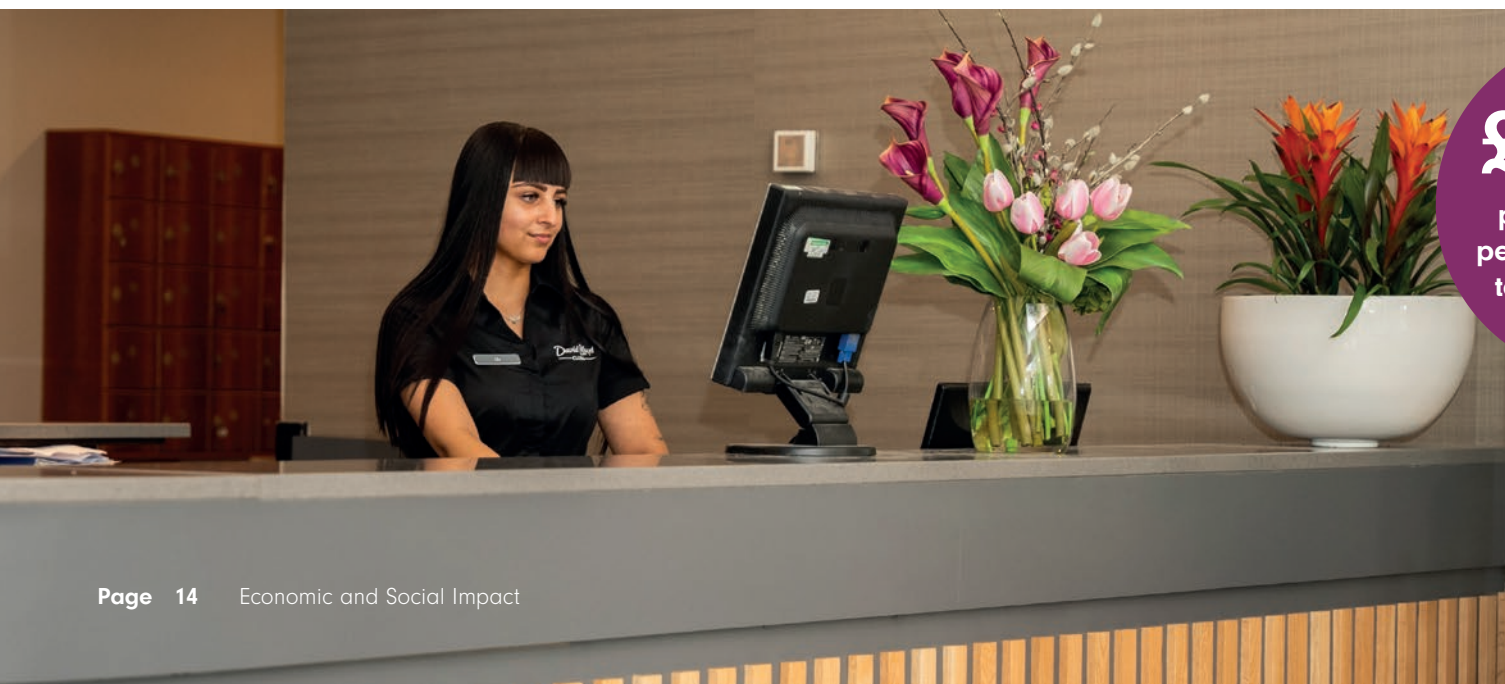
Our direct economic impact – the contribution directly related to the activities and jobs supported in our Clubs – stood at £178 million¹⁰. A further £98 million was created indirectly, as a result of the demand we supported in the supply chain. Wage expenditure by our team members and workers in the supply chain supported a further £68 million.

Social Value

DLL generated £1.4 billion (net) in social value across the UK in 2023. This figure reflects the significant contribution we make to encouraging Club members to lead physically active lives, as well as our commitment to: learning and development; supporting charities and other good causes; and creating supply chain opportunities for micro enterprises.

Our social value impact has been estimated using the HACT UK Social Value Bank. It captures DLL's contribution to the improved wellbeing of Club members, team members and the communities that our Clubs serve, as well any associated fiscal impacts.

¹⁰ Direct GVA estimated by Lichfields and based upon the value of the output generated (i.e. revenue/turnover) less the costs of production (excluding wages and impairment losses on financial assets). Calculations underpinned by data provided by DLL



£1.4bn

(net) social value
impact across the
UK in 2023

£152m

paid in wages to
permanent, salaried
team members in
2023

£344m

estimated GVA
contributed to the
UK economy



Our long-standing partnership with David Lloyd Clubs has played a key role in our growth.

Case Study: Hutchison Technologies Ltd

Founded as a sole-trader start-up in the 1990's, Hutchison Technologies has grown into one of the leading technology companies serving the leisure industry. The company has worked with DLL since 1993 and currently provides audio visual, access control and smart technology solutions to all our Clubs. The expansion of DLL during this period has helped to support the growth of Hutchinson Technologies in a structured and sustainable way.



David Lloyd Clubs adds credibility to our brand.



Case Study: The Real Wrap Co Ltd

The Real Wrap Co Ltd is a Bristol-based food manufacturer. The business has recently begun supplying DLL and the direct impact of this relationship is already clear, with many new jobs created and David Lloyd Clubs established as one of their largest accounts.

The relationship is also acting as a launchpad for further growth by supporting the business to expand into new geographical markets across the UK and secure more contracts with new customers. Being part of the DLL supply chain is seen as a 'kitemark' of quality and has helped The Real Wrap Co Ltd to pitch successfully to other leading brands.

3

Making a Difference to our Members' Lives

Supporting Active Lifestyles

In December 2023, our UK clubs had 615,000 registered members and recorded a total of 44 million visits throughout the year. We deliver 800,000 fitness classes across the UK each year, encouraging interaction and building a sense of community.



Developing Healthy Habits

Active children are more likely to grow into active adults, which is why it is important to support children to develop healthy habits and a love of sport and exercise. Our Clubs provide the perfect destination for families to stay fit and healthy together:

Our DL Kids programme (for children aged 3 to 11 years) **delivered 165,000 classes across the UK in 2023**, with a total attendance of more than 1.2 million.

We provide local schools across the UK with access to our facilities, so that children can learn to swim and enjoy our racquets courts, sports halls and exercise studios.

Supporting Emotional Wellbeing

At DLL we recognise that emotional wellbeing is just as important as physical wellbeing. We work hard to create inclusive communities and a sense of belonging that impact positively on our members' mental health. This is supported by a range of initiatives:

Delivering a varied and extensive programme of group exercise classes;

Hosting a range of social events, including themed evenings, coffee mornings, quizzes and family discos; and

Creating opportunities for members to enjoy shared interests beyond health and fitness.



“
David Lloyd Clubs in Manchester helped me change my life.”

Case Study: Josiah Ojofeitimi

During the Covid-19 lockdown, Josiah began to focus on becoming more active and improving his health. Josiah visits his local David Lloyd Club seven times a week. He has found the community to be very welcoming regardless of their level of fitness, his lifestyle has been transformed and his fitness dramatically improved.



“

Swimming as a family is a fantastic way to stay active together while making great memories. ”

Case Study: Victoria Wells

Victoria was attracted to David Lloyd Clubs by the standard of classes on offer, as well as the quality of the environment. On average, Victoria visits her local David Lloyd Club five times a week. During the week she often visits alone – but joins studio classes to train as part of a group and keep her workouts fun and engaging. At the weekend, she loves to exercise with her family, whether by attending a class or swimming with her children.



“

The people - members, trainers and staff - are all so friendly and I have seen a real positive difference in my fitness since joining. ”

Case Study: Manav Agrawal

After beginning a new job working from home, Manav decided to join David Lloyd Clubs to combine opportunities for social interaction with regular exercise. The health benefits of this were a key part of the appeal to Manav, as a man with cerebral palsy.

Manav’s physical health has improved significantly, by working with a Personal Trainer who specialises in injury rehabilitation and disability who tailors sessions to Manav’s needs. His new routine of visiting the gym has benefitted his mental health, by encouraging him to meet people in a way that wouldn’t have been possible in his new role.

4

Making a Difference to our Team Members

85% of team members feel engaged;

88% of team members are proud to work for DLL; and

90% of team members would recommend DLL products to others.



Promoting Diversity, Equity and Inclusion

We are committed to promoting Diversity, Equity and Inclusion, everyday for everyone.

We are proud to have achieved Silver Accreditation from the WiHTL for our commitments to Diversity and Inclusion.

Women accounted for 59% of all team members in 2023 and we recognise the need to support their career development and provide a strong pipeline of female talent. Mentorship and advocacy ensure that every woman in our workforce feels valued and equipped to achieve their full potential.

Promoting Wellbeing

Our team members deliver an outstanding experience for our Club members. That's why we want to ensure our benefits support their lives for the better: physically; emotionally; and financially.

Physical Health: we offer all team members free Club membership;

Mental Health: team members have access to an employee advice line and information and tools focussed on positive wellbeing; and

Financial Health: we offer team members a range of benefits including company-funded life assurance, discounted private medical insurance and a contributory pension scheme.

Promoting Learning and Development

Our commitment to learning and development offers all team members the opportunity to achieve their potential.

Apprenticeships: we offer 40 different apprenticeship programmes. Almost a thousand (990) DLL team members have enrolled on an apprenticeship programme, resulting in 620 apprenticeship achievers.

Step Up to Head of Department: intended to upskill and support team members looking to progress to Head of Department (HoD) roles. Since 2022 we have enrolled more than 320 team members onto the programme, with 56% of candidates already promoted to HoD roles.

Step Up to General Manager: designed to support team members in progressing to General Manager (GM) roles. More than two-thirds of team members who graduated from the programme are now working as GMs.



“

We visit our local David Lloyd Clubs on my days off and spend some family time together. ”

Case Study: Grant Sanders

After completing a degree in Physiology and Sports Science and excelling in roles at our Heston and Milton Keynes Clubs, Grant was offered a secondment as General Manager of Solihull. He has since progressed to the role of General Manager of David Lloyd Clubs in Bushey, which was named Club of the Year in 2024.

DLL has supported Grant's career development by providing access to a range of courses, including our 'Leading High Performance' and 'Personal Best' programmes. In addition to this professional support, Grant particularly values the wider package of benefits available to DLL team members, which promote a positive work-life balance.



“

David Lloyd Clubs has given me so many opportunities to stretch my skills and grow in my career. ”

Case Study: Alisha Byrne

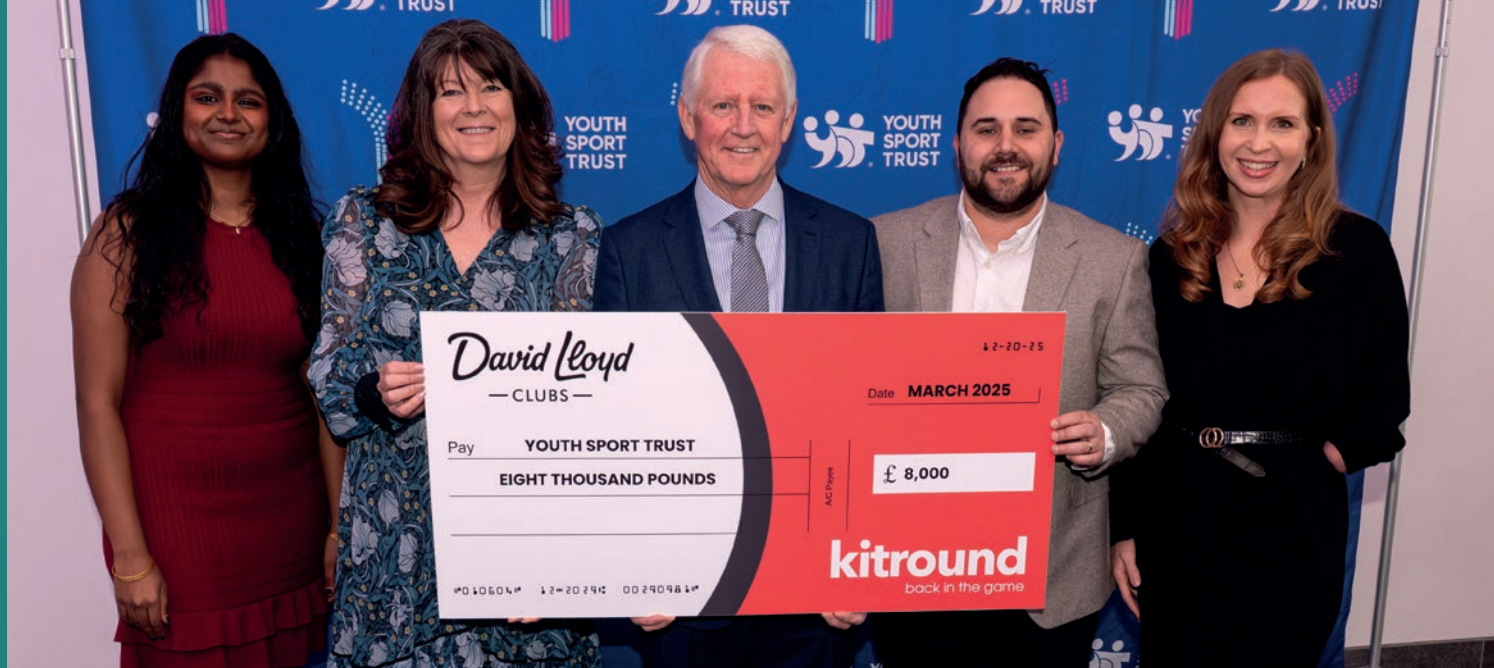
Alisha joined David Lloyd Clubs as a Fitness Manager in 2019. Having worked in the leisure industry from the age of 17, Alisha was immediately impressed by the company's commitment to nurturing team members and supporting their growth ambitions. After progressing through a number of senior roles, Alisha was offered a secondment as Acting General Manager of a Club, allowing her to demonstrate her leadership capabilities.

Alisha was keen to continue her development and David Lloyd Clubs has supported this by offering her a series of permanent General Manager roles – as well as a place on our Step Up to GM programme. This process has been incremental, with Alisha first taking responsibility for a Tier 4 Club, before moving on to a Tier 3 Club and then into her current role as General Manager of a larger Tier 2 Club in Solihull.

5

Making a Difference in the Community

Our 'Do Good' strategy is all about supporting the communities surrounding our Clubs and making a positive impact on people's lives.



Charitable Contributions

During 2024, we contributed a total of £2.7 million to support 1,200 different charities. This included £1.5 million raised through Club fundraising activity and member donations – with 76% of this benefitting local causes and charities.

In terms of the overall scale of support offered by DLL, some of the biggest stories of 2024 include:

Change Please: over £1.0 million contributed by our Clubs in 2024;

BBC Children in Need: £335,000 raised by our Clubs between October 2023 and December 2024; and

Stroke Association: advertising space with a value of £200,000 donated by DLL in 2024.

Throughout 2024, we funded more than 2,200 staff volunteer hours, allowing our team members to support the local causes that are important to them.





“
Working with David Lloyd Clubs has had an immensely positive impact on Change Please, increasing the amount of people we have been able to support out of homelessness.”

Case Study: Change Please

We're proud to be one of the founding contributors to Change Please and their biggest corporate partner, selling their award-winning coffee in our UK Clubs.

DLL also works with Change Please to help their trainees build the skills and confidence needed to move into employment and to help their trainees find employment with us. In 2024, the money raised in our Clubs allowed Change Please to: offer training to 27 people suffering homelessness; and assist 6 people suffering from homelessness to find employment.



“
We are so grateful to David Lloyd Clubs in Newbury for allowing us to host such a wonderful event and raise life changing funds for New Life Special Care Babies. It has become our flagship fundraiser that we now look forward to each year.”

Case Study: David Lloyd Newbury, 24-hour Sportathon

In recent years, David Lloyd Clubs in Newbury has hosted a 24-hour Sportathon to raise money for life-saving neonatal equipment to special care baby units across the UK.

The Sportathon offers members and guests the opportunity to participate in a range of sporting challenges, including tennis, cycling, swimming and a variety of exercise classes. The event has helped to strengthen our connection with the local community, as well as raising £200,000 for charity over a six-year period.

6

Making a Difference to the Environment

We have committed to achieving net zero by 2030, and have worked with external consultants to validate our latest carbon footprint and net zero strategy. As part of this process, we have committed and submitted our targets to the Science Based Targets Initiative (SBTi) – a global body that helps businesses set ambitious targets in line with the latest climate science.



The SBTi approval demonstrates the credibility of our net zero strategy, which will be pursued through five key initiatives:

Reducing our water and energy consumption;

Generating our own renewable energy onsite;

Reducing indirect emissions across our supply chain;

Reducing waste; and

Using sustainable modes of transport.

Generating our own Renewable Energy

In 2024, we completed the installation of solar panels at 40 Clubs across the UK and Europe. At a UK level, the solar PV rollout represents a £27 million investment and will reduce our carbon emissions by a further 6,500 tonnes each year.

7

Investing for the Future

DLL is owned by UK-based TDR Capital, who have invested heavily in the business since its acquisition in November 2013. During this period, we have opened 48 new Clubs – including 27 in the UK.

The number of UK residents with a health club membership has increased in recent years and stood at 10.7 million in 2024. Expenditure on health club memberships is expected to grow from £5.6 billion in 2024 to £6.3 billion by 2027.

In addition, recent DLL analysis identified 100 towns and cities nationally with: the demographic profile required to support a Club; and an under-provision of premium health and racquet facilities. Between 2025 and 2030, these opportunities could see us deliver a capital expenditure programme worth almost £1.3 billion across the UK. This offers the potential to support thousands of jobs in the UK construction industry and is comprised of:

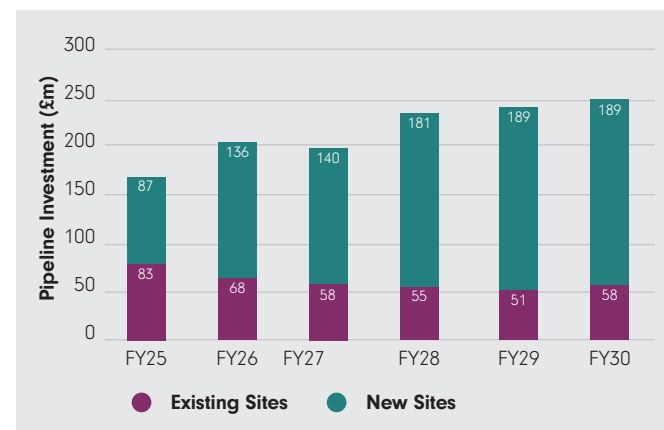
£922 million on the delivery of new sites

(including land acquisition, fees and construction costs); and

£373 million on product refresh/refurbishment projects within our existing estate.

Alongside this capital expenditure programme, we will continue to invest in the maintenance of our Clubs and in growing our online offer.

Through this investment, DLL will continue to play an active role in the communities in which we operate, and generate economic value in each region and across the UK.





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