

Fachverband Freizeit- und  
Sportbetriebe

# European Health & Fitness Market Report 2016

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Kurzfassung Österreich (englisch)



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# Health and fitness market

In this third edition, the 2016 EuropeActive European Health & Fitness Market Report presents the most comprehensive analysis of the European health and fitness industry to date. The report contains the most important current information on the main European fitness markets, the major club operators in Europe and recent merger and acquisition activities, as well as a snapshot of the leading equipment manufacturers worldwide.

As shown in the first chapter of this report, the top 10 players achieved total revenues of EUR 2.8 billion in 2015. This represents 10.3% of the total European market, which has a market value of EUR 26.7 billion (+4.9%). With respect to membership, the 30 largest operators had a total of almost 11 million members at the end of 2015, an increase of 7.1% compared to the previous year's top 30. This total accounts for 20.9% of the total European market of 52.4 million health and fitness club members at the end of 2015.

The leading operator in terms of membership remains the German discount chain McFIT/High5 with an estimated total of 1.37 million members. The Dutch low-cost operator Basic-Fit reported a combined total of about one million members at the end of 2015, while the British chain Pure Gym ranks third after increasing its membership by 260,000 to 680,000 in 2015.

The European revenue ranking is led by the British premium operators Virgin Active (EUR 485 million) and David Lloyd Leisure (EUR 460 million). Scandinavian market leader Health & Fitness Nordic (EUR 321 million) ranks third, followed by McFIT/High5 with estimated revenues of EUR 268 million.

Health and fitness club operators remained highly attractive for investors in 2015, from both inside and outside the industry. As presented in the merger and acquisitions section, there were 19 M&A transactions in 2015, the same number as last year and more than twice as many as two years ago. This is another indicator of the high attractiveness of health and fitness companies for both strategic and financial investors.

In addition to its focus on operators, the report also contains a snapshot of the global equipment industry, highlighting the status

and development of leading fitness equipment suppliers. The year 2015 was another year of strong growth for the global commercial fitness equipment industry, which has an estimated market size of EUR 2.65 billion. The selected leading manufacturers, which account for 72% of the total commercial market, achieved a growth rate of 14.7% in 2015 (influenced by currency effects because of the strong US dollar).

Furthermore, this report provides detailed profiles of the largest national fitness markets in Europe. Together, the 18 countries analysed have 51.5 million members (98.2% of the European market), revenues of EUR 25.7 billion (96.5%) and 48,217 clubs (94.2%). This underlines the relevance of this report with regard to the entire European health and fitness market.

With a total market volume of almost EUR 26.7 billion, Europe has taken over the leading role as the largest fitness market in the world. In comparison, the United States recorded revenues of EUR 23.5 billion in 2015 according to IHRSA (as stated in Health Club Management). At the same time, the total market volume exceeds that of the European football market, which amounted to EUR 21.3 billion in the 2013/14 season.

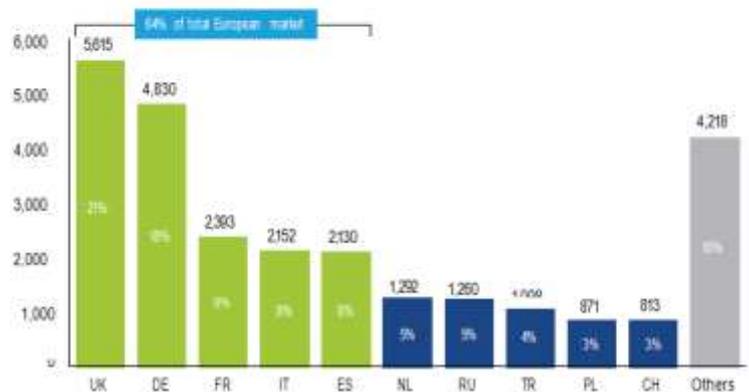
As shown in Figure 1, the two largest national fitness markets in Europe are the United Kingdom (EUR 5.6 billion) and Germany (EUR 4.8 billion). When combined with France (EUR 2.4 billion), Italy (EUR 2.2 billion) and Spain (EUR 2.1 billion), the five leading countries account for 64% of the total European health and fitness market. At the same time, Eastern European markets such as Russia, Turkey and Poland have entered the top 10 and despite the fact that these countries have evidenced lower membership growth in the previous years than the other markets, they will likely offer higher growth potential in the medium to long-term.

Based on membership, Germany is the largest market in Europe with a total of 9.5 million. The UK is second with 8.8 million members followed by France (5.2 million), Italy (5.1 million) and Spain (4.9 million). As shown in Figure 2, Turkey and Russia still display considerable market potential with penetration rates of 2.4% and 1.9% respectively. By contrast, Norway is the most mature market with 4,823 inhabitants per club and a penetration rate of 19.4%. Among the top 10 countries, Sweden and the Netherlands are the most mature markets with penetration rates of 16.7% and 16.4%, respectively.

This report is the most comprehensive piece of research on the European health and fitness market to date, but it is still only a step towards more transparency and

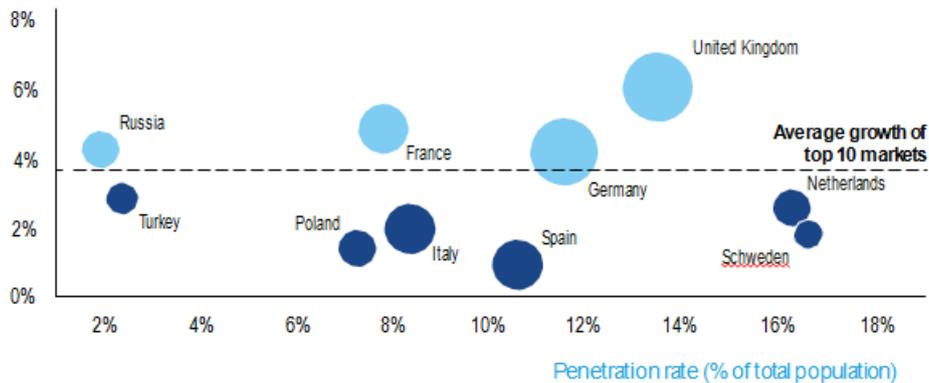
knowledge in this exciting industry. More work must be done in the future to obtain reliable data on the development of the individual national markets and leading fitness operators of the European health and fitness industry.

**Fig. 1 – Top 10 European fitness markets by revenue in million EUR and share of the total European market (2015)**



**Fig. 2 – Total membership, membership growth and penetration rate of top 10 European fitness markets (2015)**

**Membership growth**



■ Above-average growth markets   ■ Below-average growth markets

Bubble size represents total membership as of 2015



### Health and fitness market

Austria has a total of 0.74 million members, who exercise at 1,002 private fitness clubs across the country, according to the country's national fitness association. This equates to 8.6% of the total population and 10.1% of the population aged 15 years and older. In addition, there are an estimated 60 public health and fitness clubs, leading to a total of 1,062 fitness clubs in the country. On average, the private Austrian fitness clubs have 739 members per club, a decrease of 8.2% compared to the previous year. This reflects the trend of an increasing number of boutique studios as stated by market experts. More than one third of all survey respondents were operating micro clubs with less than 200m<sup>2</sup> of gym space, by far the largest figure among all markets.

Average gross membership fee per member per month is EUR 54.1, resulting in a market volume of EUR 400 million in terms of net membership revenues. Including secondary revenues, the total market value increased by 2.8% to EUR 440 million. The decrease in membership fees compared to the previous year (EUR 55.5) reflects the growing budget sector of the market. Most notably, this includes the Austrian budget provider FitInn (27 clubs) as well as its German rivals McFIT/High5 (eleven clubs) and franchise organisation clever fit (six clubs).

These three fitness club operators, along with premium operators INJOY (40 clubs) and John Harris (ten clubs), are also among the leading players in the Austrian market, which represented about 30.6% of the overall number of clubs in 2015, with a combined total of 325 sites. Along with France, Austria is estimated to have the highest market share of franchises in Europe, including major chain operators such as INJOY, Kieser Training and clever fit but also micro club operators like Mrs.Sporty, EMS Station/LifeStyle Ladies (partly franchise), Bodystreet and Curves.

The total number of fitness and administrative employees at private fitness clubs in Austria is estimated at 7,800 fulltime equivalents. Furthermore, 16.2% of the clubs reported cooperation with health insurers, a number above the average in Europe. Regarding individual club development in 2016, sentiment in the Austrian market can be described as optimistic, with 45.2% of respondents expecting revenue increases of between 2.5% and 7.5% and another 12.9% expecting growth of more than 7.5% in 2016.

Fig. 34 – Leading regular operators by number of clubs

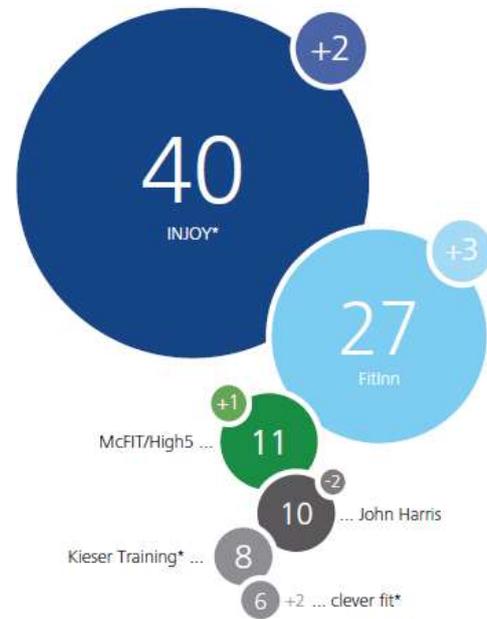
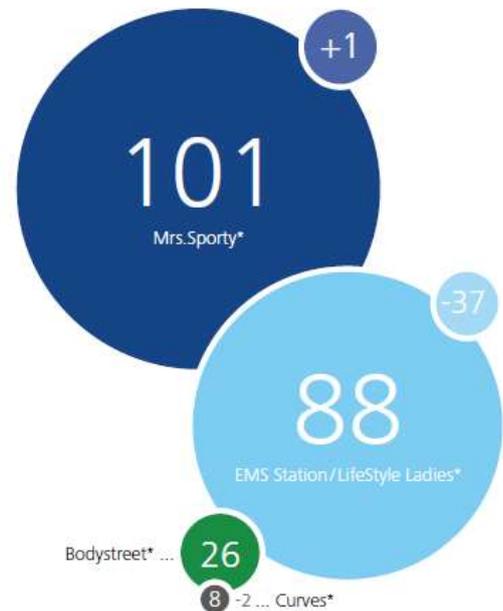


Fig. 35 – Leading micro club operators by number of clubs



\* fully or partly a franchise operation



### Eurobarometer

In Austria, 45% of the population exercises with at least some regularity and just over half of the population exercise outdoors (54%). Besides the main reason of improving health (63%), 35% mentioned meeting with friends as an important reason for exercising. Conversely, a lack of time and motivation was mentioned by 57% as the main obstacle to training. 81% of Austrians are satisfied with the offerings of local sport clubs and other local providers.

### General country information

In 2015, Austria had approximately 8.6 million inhabitants, of whom 67.1% were between 15 and 64 years of age. The country's real GDP per capita amounted to EUR 36,000 in 2015, with a real disposable income of EUR 25,850 in 2014. The unemployment rate was 5.6% in 2014. Leisure and culture made up 10.3% of consumer expenditures in 2014. Health 3.6%. The standard VAT rate is 20%, with no special discount for fitness operators.

### National Association

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<sup>[1]</sup> Alle Angaben erfolgen trotz sorgfältiger  
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