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europe active
MORE PEOPLE | MORE ACTIVE | MORE OFTEN

ACTIVE
CONSOLIDATION
M&A
MEMBERS
RETENTION
ENGAGEMENT
EUROPE
FRANCHISE
TECHNOLOGY
EXPERIENCE
IPO
MOTIVATION
PERSPECTIVES
HEALTH & FITNESS
INNOVATION
BOUTIQUE
PREMIUM
DISCOUNT
OUTDOOR
DIGITAL
TRAINER
CLUBS
GROWTH MARKET
LIFESTYLE
WEARABLES

European Health & Fitness Market Report 2017

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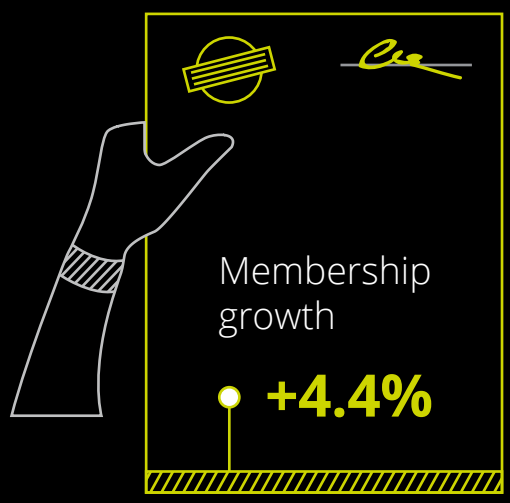
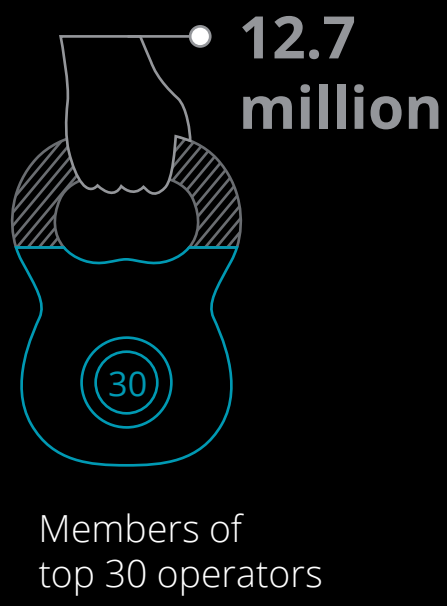
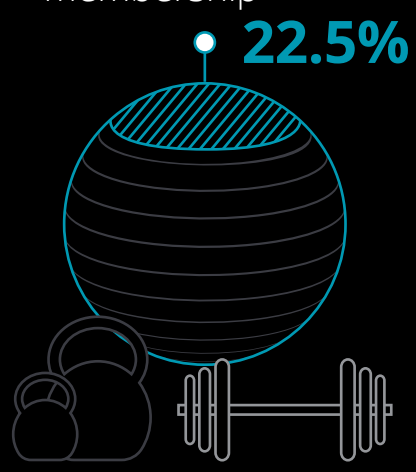
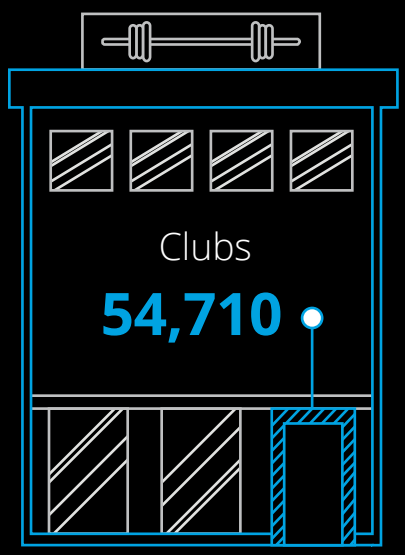
The European Fitness Market at a Glance



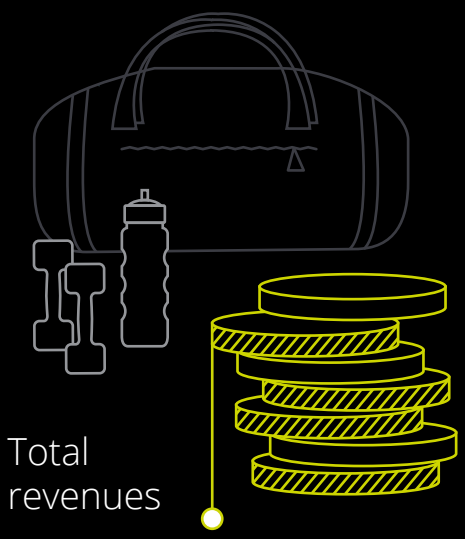





Clubs
54,710

M&A deals
17

Global net sales of leading equipment manufacturers
EUR 2.9 billion


Total revenues
EUR 26.3 billion

Average gross membership fee per month
EUR 41.4

Germany

Market insights
It was a historical year for the German health and fitness market, which passed the benchmarks of 10 million memberships and EUR 5 billion in total revenues for the first time. Thus, 12.3% of the total population are members at one of the 8,684 private fitness clubs. It should be noted that the underlying 'Eckdatenstudie' published by the DSSV, DHfPG and Deloitte does not include public sports clubs ('Vereine'), as these offer a wide range of different sports but are generally less relevant to the total picture of the fitness market compared to other countries such as the UK.

Overall, the ten leading operators have a market share of 19% in terms of clubs and 31% in terms of members. While micro club franchise operator Mrs.Sporty (385) remains far ahead in terms of club numbers, the low-cost operators McFIT Group, clever fit, FitX and EASYFITNESS were the fastest-growing companies in absolute terms with an estimated 345,000 additional members (+19.2%) and account for more than 21% of the total membership base. Relevant players in the premium and upper market segments include Swiss-based Migros, which purchased franchise operator INJOY in 2016 in addition to its premium ELEMENTS brand, as well as Kieser Training, Fitness First and Pfitzenmeier Group. The standard VAT rate is 19% and there is no discount on fitness services.

National association
DSSV
Arbeitgeberverband deutscher Fitness- und Gesundheits-Anlagen

Birgit Schwarze
http://www.dssv.de/

Fig. 52 – Leading regular operators by number of clubs

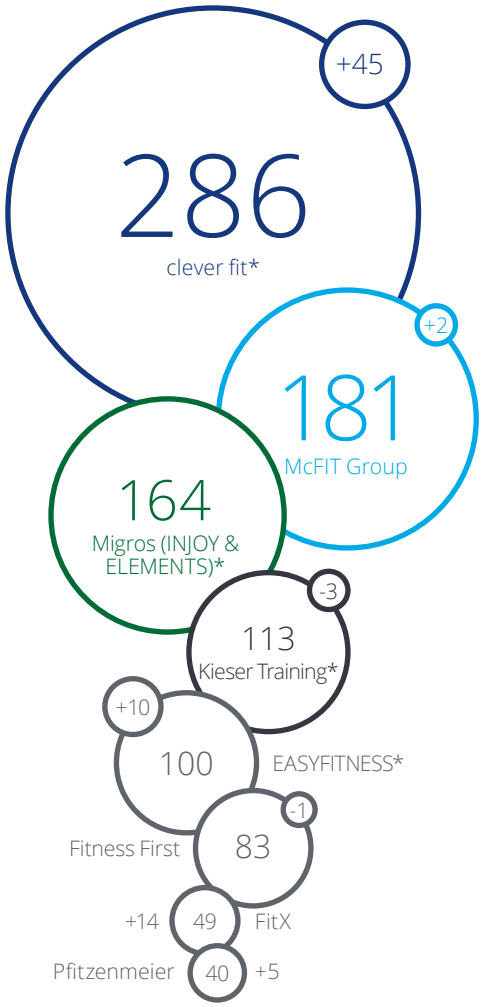
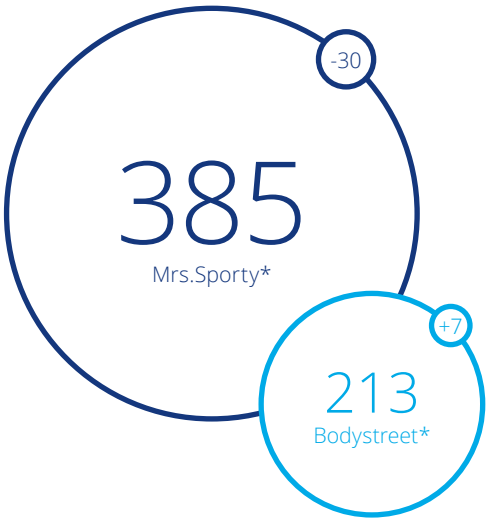
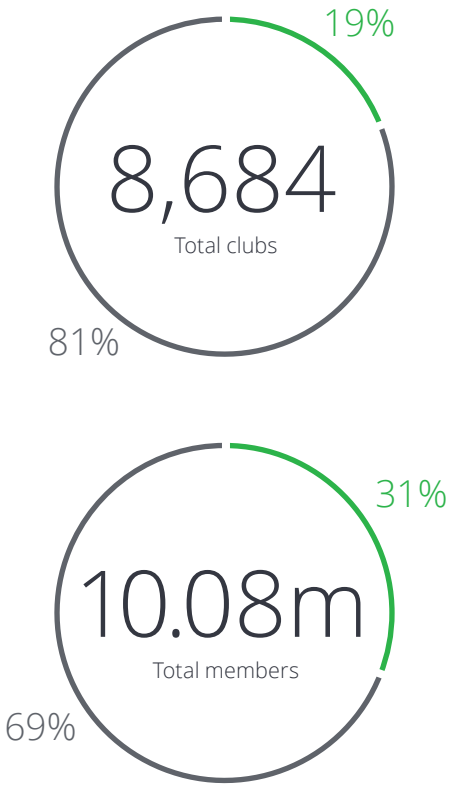


Fig. 53 – Leading micro club operators by number of clubs



* fully or partly a franchise operation

Fig. 54 – Market share of leading operators



		2015	2016	EHFMR average (2016)
	Total population	81.2m	82.2m	
	Population 15–64	53.7m	54.1m	
	Disposable income/person*	EUR 27,159	EUR 28,231	EUR 23,099
	% of population engaging in physical activity*	48.5%	48.5%	43.4%
	% of population with fitness club membership	11.6%	12.3%	8.1%
	Fitness club members	9,460,000	10,080,000	
	Number of clubs	8,332	8,684	
	Members/club	1,135	1,161	1,087
	Physically active people in population/club	4,722	4,586	4,358
	Total revenue (excl. VAT)	EUR 4,830m	EUR 5,050m	
	Average membership fee/month (incl. VAT)	EUR 45.3	EUR 44.8	EUR 41.9
	Average membership fee as % of disposable income	2.0%	1.9%	2.2%

*Disposable income figures relate to the respective prior year periods; Physical activity relates to people that are physically active with at least some regularity, according to the EU Eurobarometer 'Sport and physical activity' in 2013. This study did not include Norway, Russia, Switzerland and Turkey.

External sources: Eckdaten der deutschen Fitness-Wirtschaft 2017 (DSSV/DHfPG/Deloitte)

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