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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.
Health and fitness market

In Poland, 2.77 million people are members at approximately 2,520 fitness clubs. This is the equivalent of 7.3% of the total population and 8.6% of the population aged 15 and above. The majority of clubs are privately owned and only 200 facilities are estimated to be publicly operated. There were 1,099 members per club at the end of 2015, indicating year-on-year growth of 0.7%.

The average gross membership fee per member and month remained fairly stable at EUR 29.3, resulting in a market volume of EUR 792 million in terms of net membership revenues. The total market value is estimated at EUR 871 million, an increase of 1.3% compared to the previous year.

The market share of the ten leading companies is relatively small with only 6.0%. While the leading market positions are held by domestic operators such as Pure Jatomi, Calypso, Energy Fitness, Fitness Platinium and Zdrofit, the foreign budget chains McFIT, Fitness24Seven and Fitness World are also active in the Polish market with a combined 17 clubs. Fitness World entered the Polish market through the acquisition of five “Condizione” clubs in January 2015.

Like last year, Polish fitness operators are considerably optimistic for the future as 77.7% of all survey respondents expect their revenues to increase by at least 2.5% in 2016. It appears that their optimism may be justified, with 71.4% of all participants reporting a growth rate of at least 2.5% in 2015. The total number of fitness and administrative employees at fitness clubs in Poland is estimated to be around 27,800 full-time equivalents. 7.4% of all clubs claim to cooperate with health insurers.

**Fig. 51 – Leading regular operators by number of clubs**

**Fig. 52 – Leading micro club operators by number of clubs**

*Fully or partly a franchise operation*
**Eurobarometer**

In Poland, only 28% of the population engages in physical activity with at least some regularity. The majority either exercise at home (37%) or outdoors (35%). 9% choose fitness clubs as their preferred venue for sports. For almost 60%, better health is the major motivator for exercise; 30% want to improve their fitness. The main reason that keeps people from exercising more frequently is a lack of time (46%), followed by a lack of interest (10%). Almost 90% of the Polish are not members of any sports organisation. 60% agree that there are enough opportunities provided by local sports clubs, whereas only 38% are satisfied with what their local authorities are doing for their citizens with regard to physical activity.

**General country information**

In 2015, Poland had a population of 38.0 million, of whom 70.1% were between 15 and 64 years of age. The country’s real GDP per capita amounted to EUR 10,900 in 2015, with a real disposable income of EUR 14,062 in 2014. Additionally, the unemployment rate decreased from 9% in 2014 to 7.5% in 2015. With regard to consumer spending, 7.6% went toward leisure and culture in 2014, whereas 5.1% was spent on health. Finally, the standard VAT rate is 23% and there is no discounted rate on fitness services.

**National Association**

PZFW
Polski Związek Fitness & Wellness
http://www.pzfw.pl/
PZPF
Polski Związek Pracodawców Fitness
Robert Kamiński
http://www.pzpf.org.pl/

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