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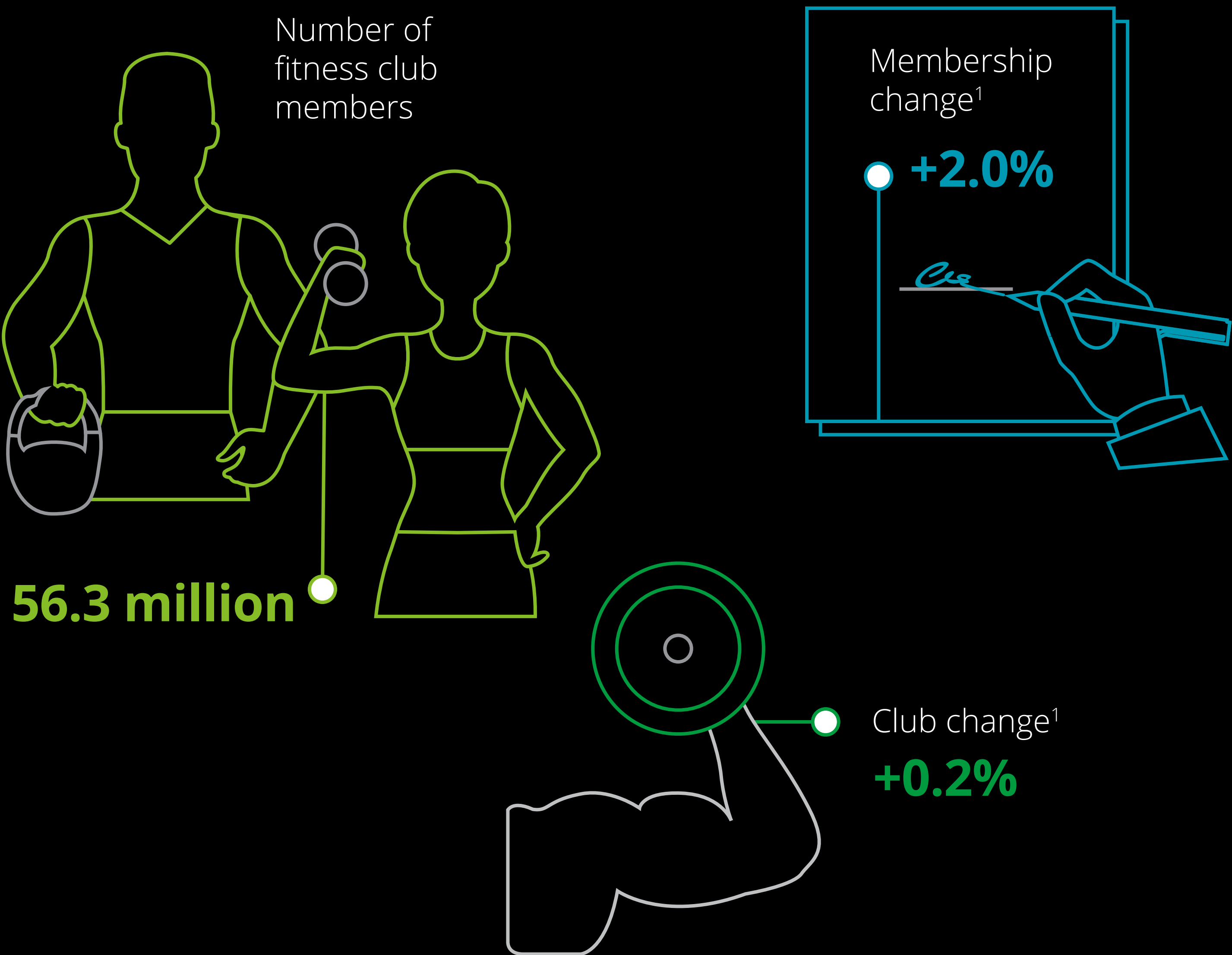
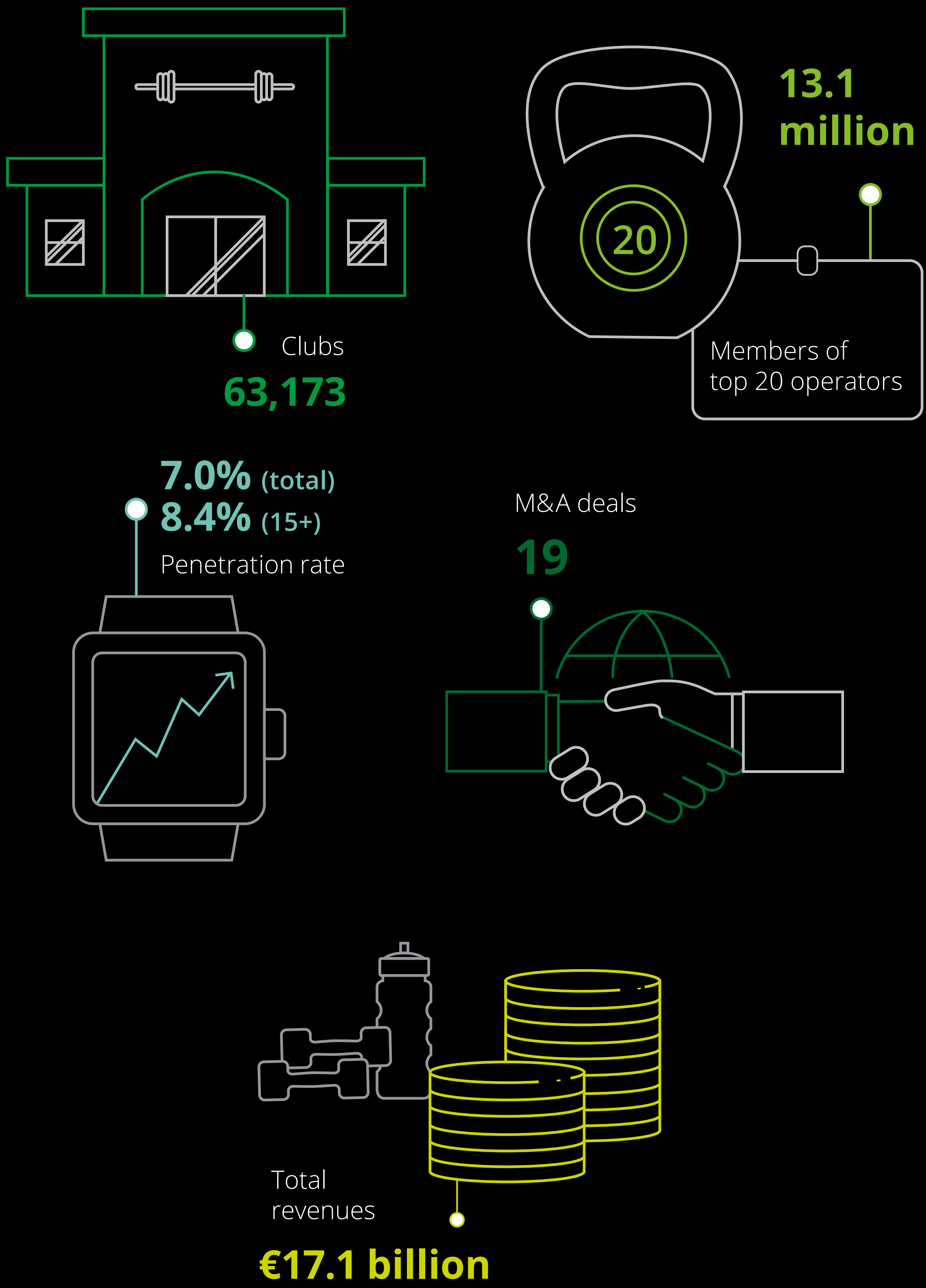
European Health & Fitness Market Report 2022

The European Fitness Market at a Glance

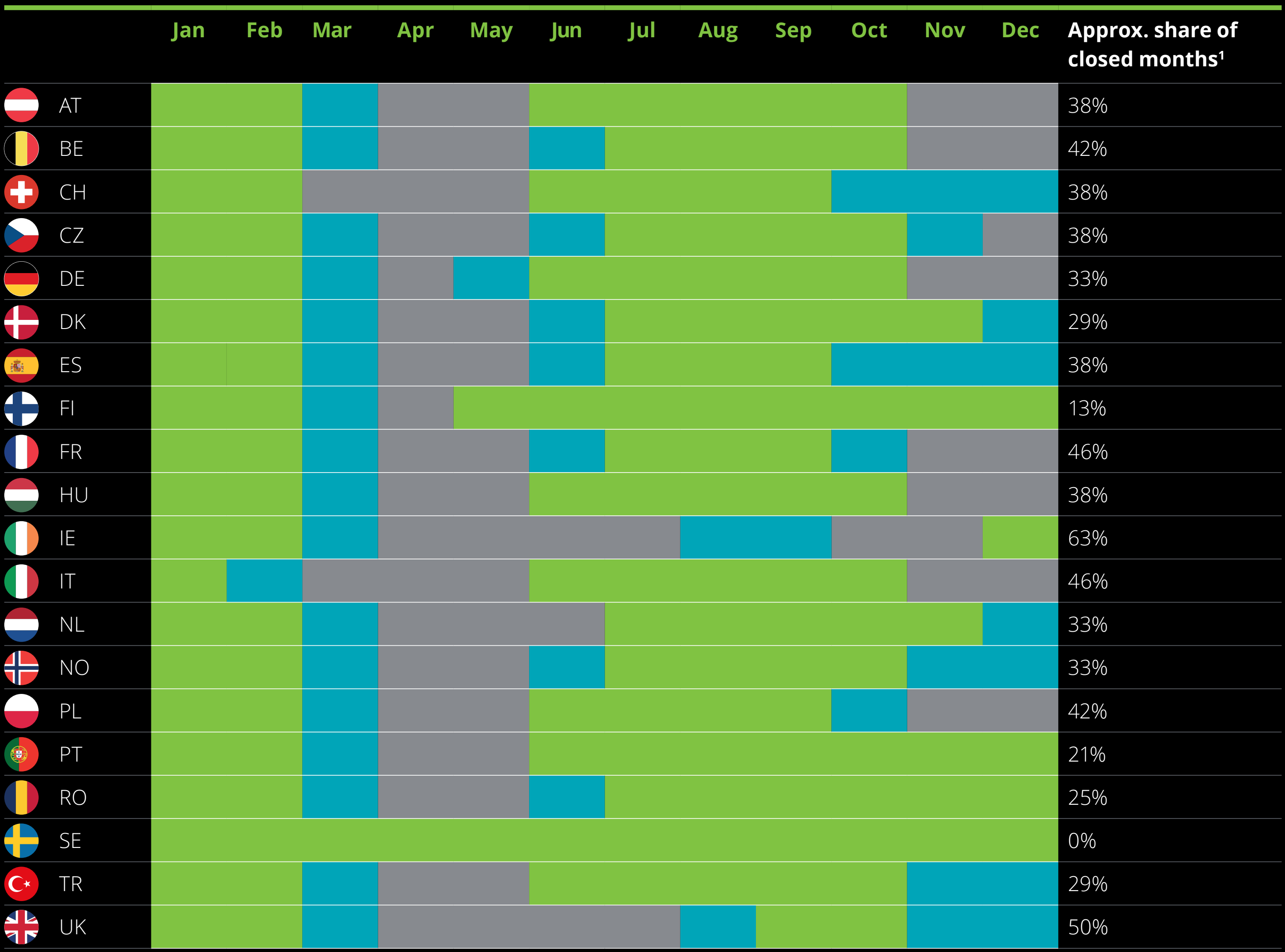


Note: 1) Relative changes compared to previous year calculated on adjusted 2020 KPIs due to restatements performed by national associations.
Source: Deloitte analysis.



Source: Deloitte analysis.

Fig. 1 – Indicative overview of opened and closed periods of fitness clubs in selected European countries in 2020

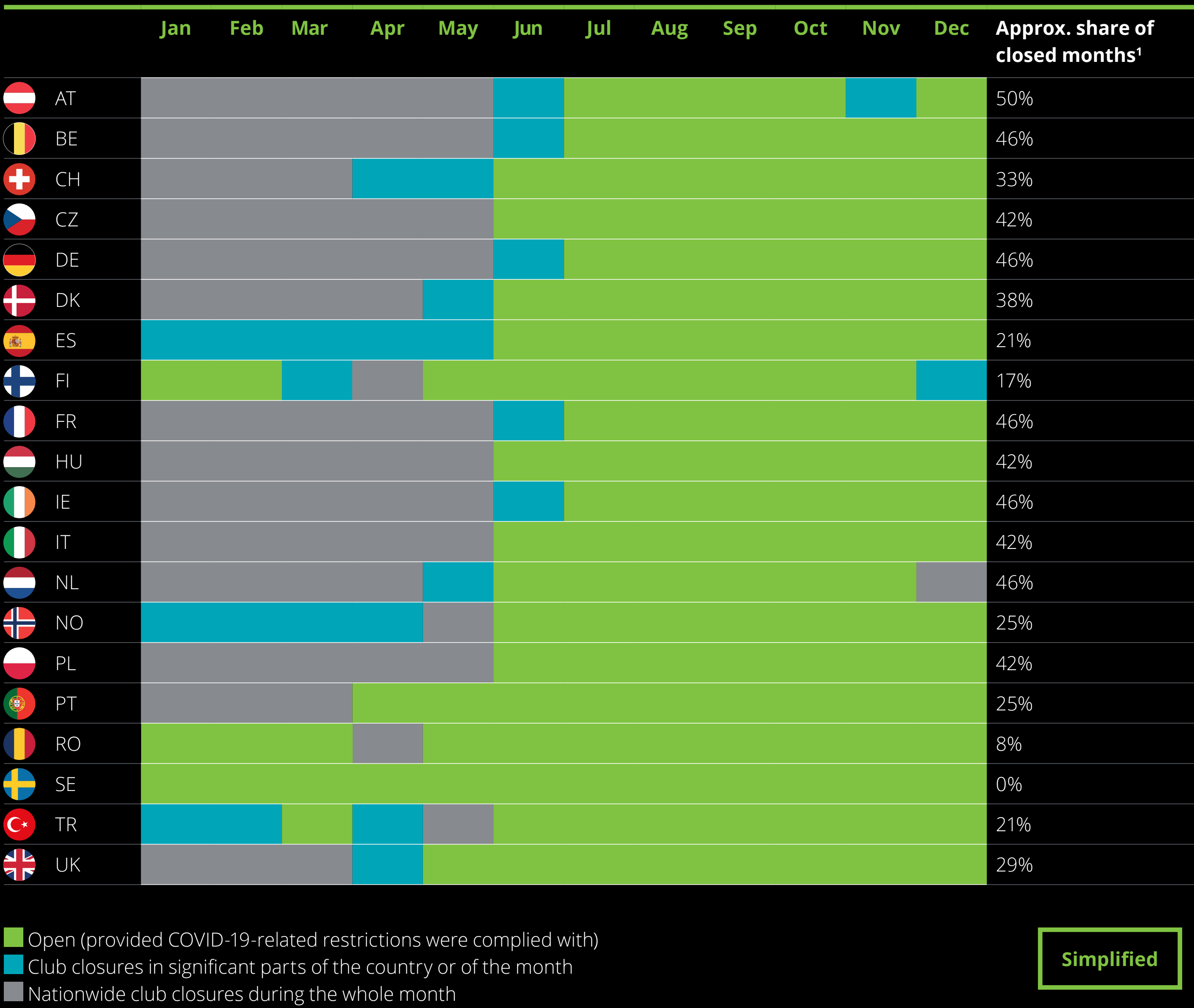


Open (provided COVID-19-related restrictions were complied with)
Club closures in significant parts of the country or of the month
Nationwide club closures during the whole month

Simplified

Note: 1) Club closures in significant parts of the country or of the month are considered open 50% of the month.
Source: Deloitte analysis.

Fig. 2 – Indicative overview of opened and closed periods of fitness clubs in selected European countries in 2021



Note: 1) Club closures in significant parts of the country or of the month are considered open 50% of the month.
Source: Deloitte analysis.

Fig. 3 – Development of revenues and memberships since 2017[1]

CAGR	2017–2019	2019–2020	2020–2021
Revenues:	2.9%	-32.9%	-11.4%
Memberships:	3.9%	-15.4%	2.0%

Note: 1) Historic revenue and membership figures slightly differ from previous reports as they include restatements of national associations.
Source: Deloitte analysis.

Fig. 4 – Revenue development in selected markets

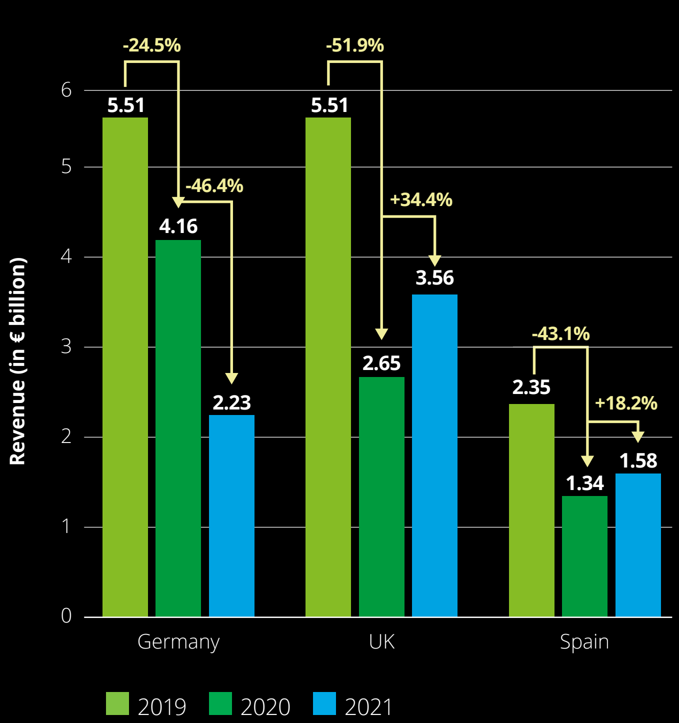
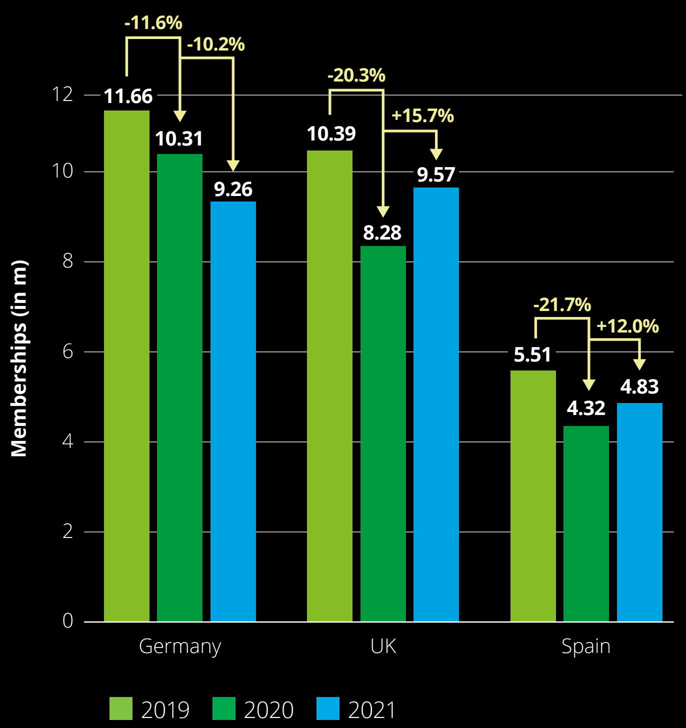


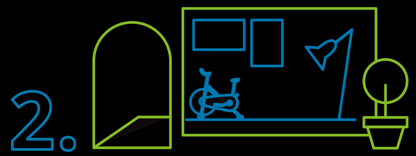
Fig. 5 – Membership development in selected markets



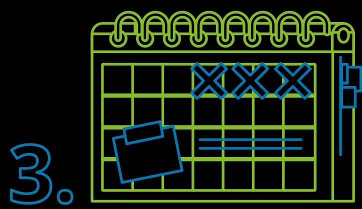
Source: Deloitte analysis.

Seven overarching factors impacting how and where Europeans perform fitness, according to the EuropeActive Consumer Survey[1]

Consumers combine different fitness settings (outdoors, at home and clubs)

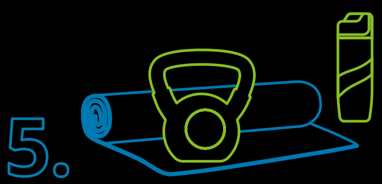


Fitness intermediaries foster boutique studio visits



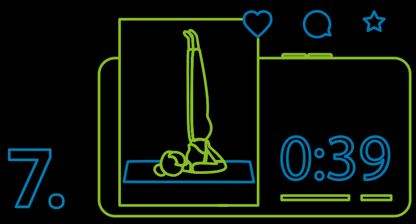
COVID-19 disrupted fitness club routines

Equipment and social experience are key fitness club USPs



Small workout equipment drives at-home fitness

Corporate fitness shows potential waiting to be unlocked



Millennials drive digitalisation in fitness

Note: 1) Based on 10,888 respondents across 19 European countries in January 2022.
Sources: EuropeActive Consumer Survey 2022.

Germany

Clubs / 9,538
9,492

Revenue / EUR 4,160 m
EUR 2,230 m

Members / 10,310,000
9,260,000

Market insights

Until the COVID 19-related closures, which started in March 2020, the key figures[1] of the German fitness industry showed a sustained positive development. Between 2017 and 2019, an average annual revenue growth of 2.9% was achieved. During the same period, the number of facilities and memberships grew by an average of 3.7% and 4.8%, respectively.

After declines between 1.4% and 24.5% of all key figures in terms of members, clubs, and revenues in 2020, revenues decreased by 1.93 billion to 2.23 billion (-46.4%) in 2021. In terms of memberships, there was a net decrease of 1.05 million which also equates to a negative development in the double-digit percentage range (-10.2%). This means that the number of memberships dropped to a level that initially had been reached between 2014 and 2015. The number of clubs also slightly declined under the ongoing influence of the COVID-19 pandemic, after a steady increase in the number of clubs before the outbreak of the pandemic. With 9,492 clubs at the end of 2021 (-0.5%), 46 fewer facilities were counted compared to 2020.

In 2021, fitness operators in Germany had to restrict their operations to varying extents during a total period of five and a half months. This places Germany above the average in a European comparison, with all closures occurring during the first half of the year.

Among the largest German operators, some expanding companies experienced a distinct growth dynamic in recent years, which is why 6 of the top 10 operators by clubs increased their club base despite the ongoing COVID-19-related restrictions. Therefore, clever fit (+25), RSG Group (+7), and EASYFITNESS (+20) operated more clubs than in the previous year, solidifying their Top-3 positions. The same applies to FitX (+4), which is the second largest operator by membership, as well as BestFit Group (+5) and FIT/ ONE (+2).

Together, the leading operators account for around 43% of the total membership base. This list also includes premium and upper mid-market operators such as ACISO, Kieser Training, and LifeFit Group.

The VAT rate for fitness in Germany is 19%.

Consumer Survey Results

In EuropeActive's European Health and Fitness Consumer Survey conducted in January 2022, 68% of Germans aged 16 and above stated that they practise fitness – i.e., at a fitness club, at home, or outdoors – with at least some regularity, which is on a comparable level with countries such as Austria (71%), Sweden (69%), and Spain (65%). Consumer statements suggest that the overall fitness activity at the time that the survey was conducted had decreased compared to pre-COVID-19 levels, with 19% of Germans stating that they do fitness more frequently than before the pandemic, while 27% reported that they exercise less.

Looking forward, however, this relation is expected to reverse, as 26% intend to exercise more often in the future, while only 8% expect to exercise less often. These numbers are in line with the extended closure times in Germany in 2021 and restrictions on club visits in effect at the time of the survey.

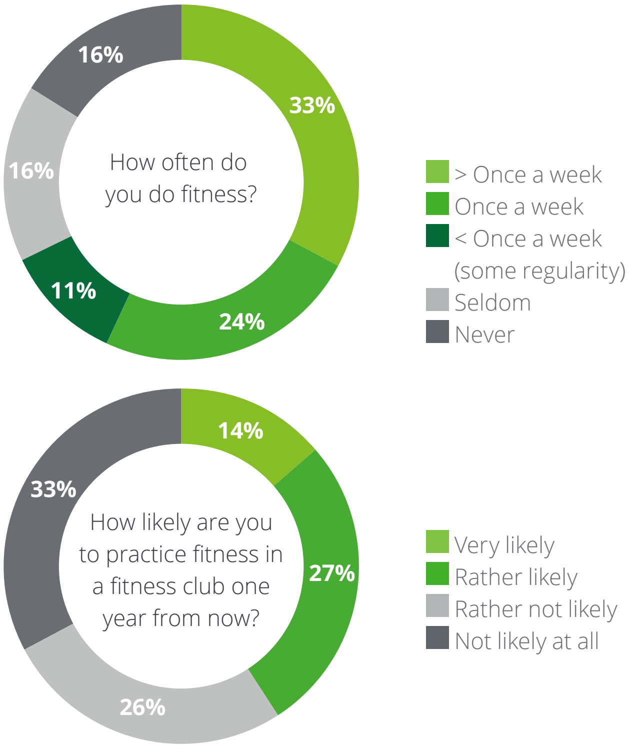
National Association

DSSV
Arbeitgeberverband deutscher Fitness und Gesundheitsanlagen
Birgit Schwarze
www.dssv.de

* Population and disposable income figures relate to the respective prior year periods.

Notes: 1) It should be noted that the underlying data survey "Eckdaten der deutschen Fitness-Wirtschaft 2021", published by DSSV, DHfPG, and Deloitte, does not include non-profit sports clubs ("Vereine"), as these typically offer a wide range of sports in addition to fitness and are generally considered less relevant to the total fitness market picture.
External sources: Eckdaten der deutschen FitnessWirtschaft 2021 (DSSV/DHfPG/Deloitte).

Fig. 38 – EuropeActive Consumer Survey results for Germany
N=755; German consumers age 16 and above



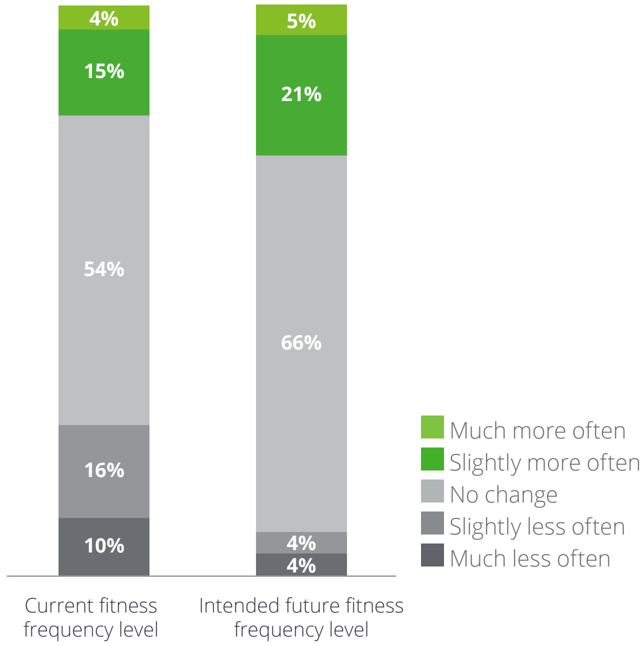
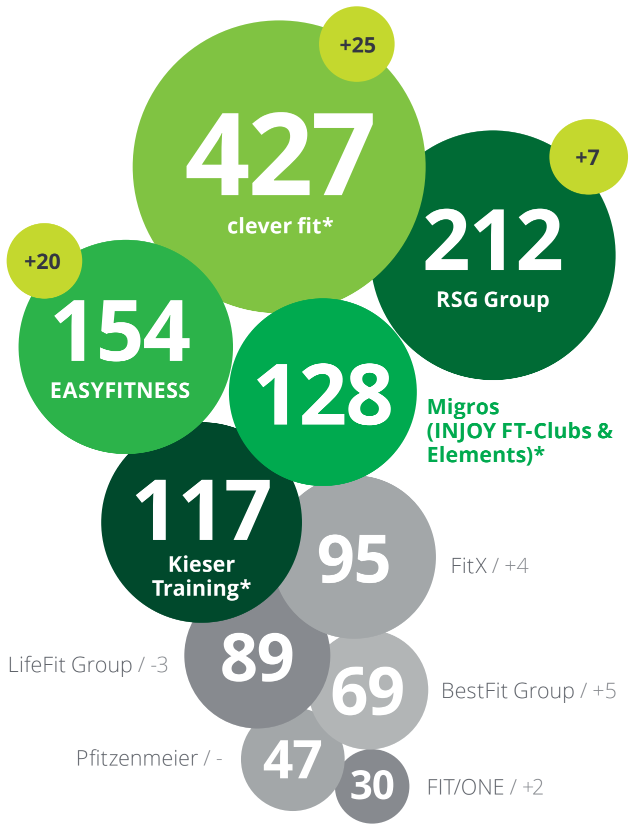
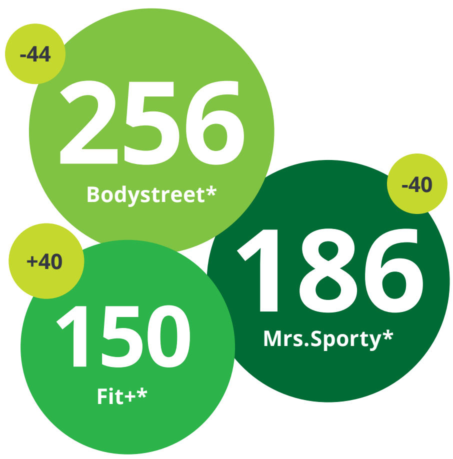


Fig. 39 – Leading regular operators by number of clubs



* Fully or partly a franchise operation.

Fig. 40 – Leading micro-club operators by number of clubs



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EuropeActive European Health & Fitness Market Report 2022
Report as of 31 December 2021

Publisher: EuropeActive
Authors: Herman Rutgers, Karsten Hollasch, Stefan Ludwig,
Steffen Gausselmann, Jakob Papenbrock, Marc Friedrich, Mandy Brockskothen
Publication date: April 2022

Price: €399 (for EuropeActive members: €199);
prices excluding VAT, please order via www.europeactive.eu

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Issue 04/2022

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