



European
Health & Fitness Market
Report 2021

Preface	04
Introduction	06
The European Fitness Market at a Glance	08
The Ecosystem of the European Fitness Sector	12
Top Operators – Rankings	24
Top 20 Operators – Profiles	30
Selected Operators – Profiles	56
Other Selected Operators – Short Profiles	66
Mergers & Acquisitions	68
The View from Brussels	76
Selected Markets – Overview	82
Selected Markets – Profiles	84
Selected Markets – Short Profiles	92
Thoughts on the Long-Term Future of the Sector	114
Appendix	116
About EuropeActive	118
EuropeActive Event Calendar	120
About Deloitte Sports Business Group	121
Methodology	122
Glossary	124
Your Contacts	128

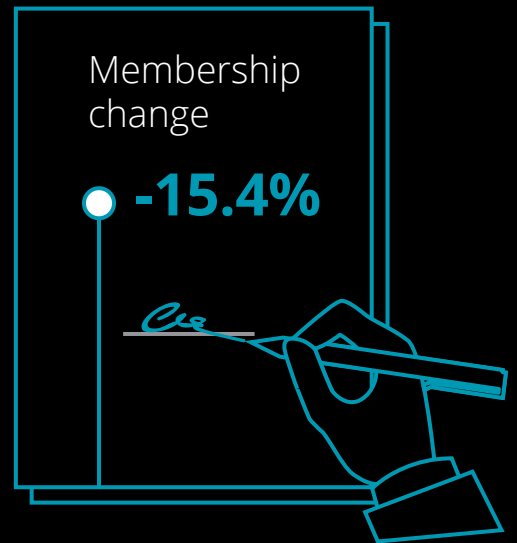
The European Fitness Market at a Glance

Number of fitness club members



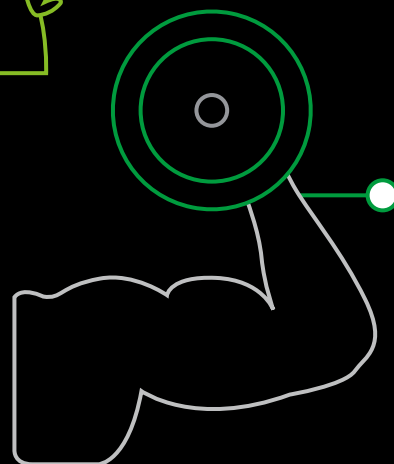
Membership change

-15.4%



Club change

-1.4%



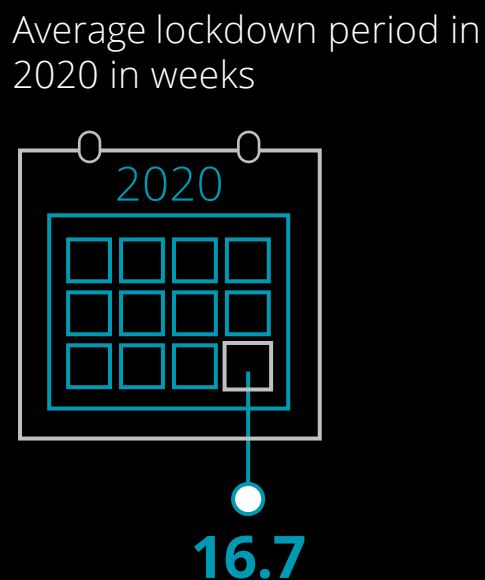
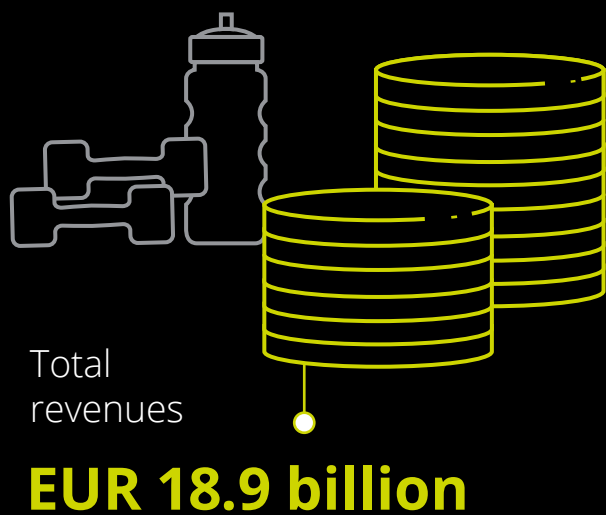
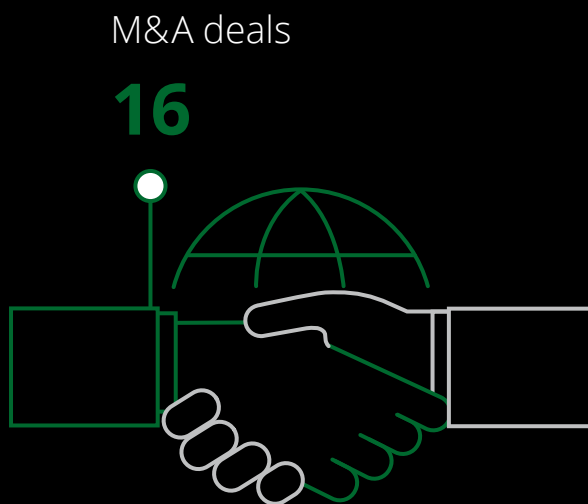
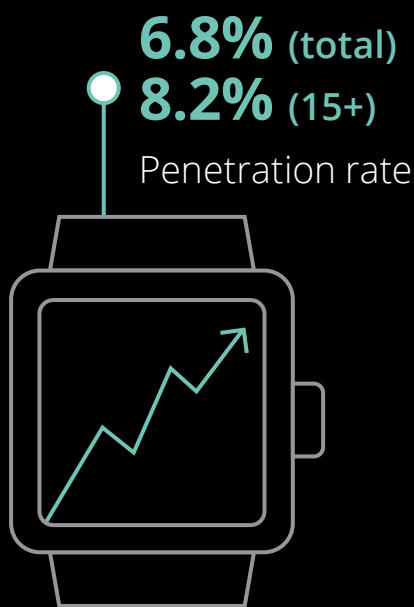
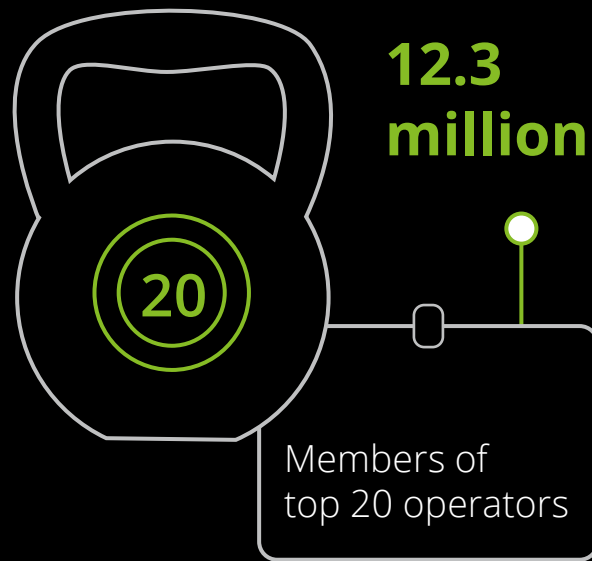
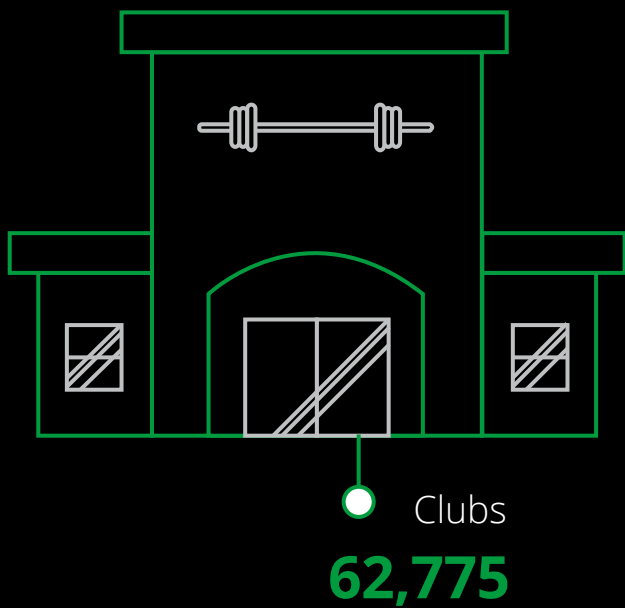
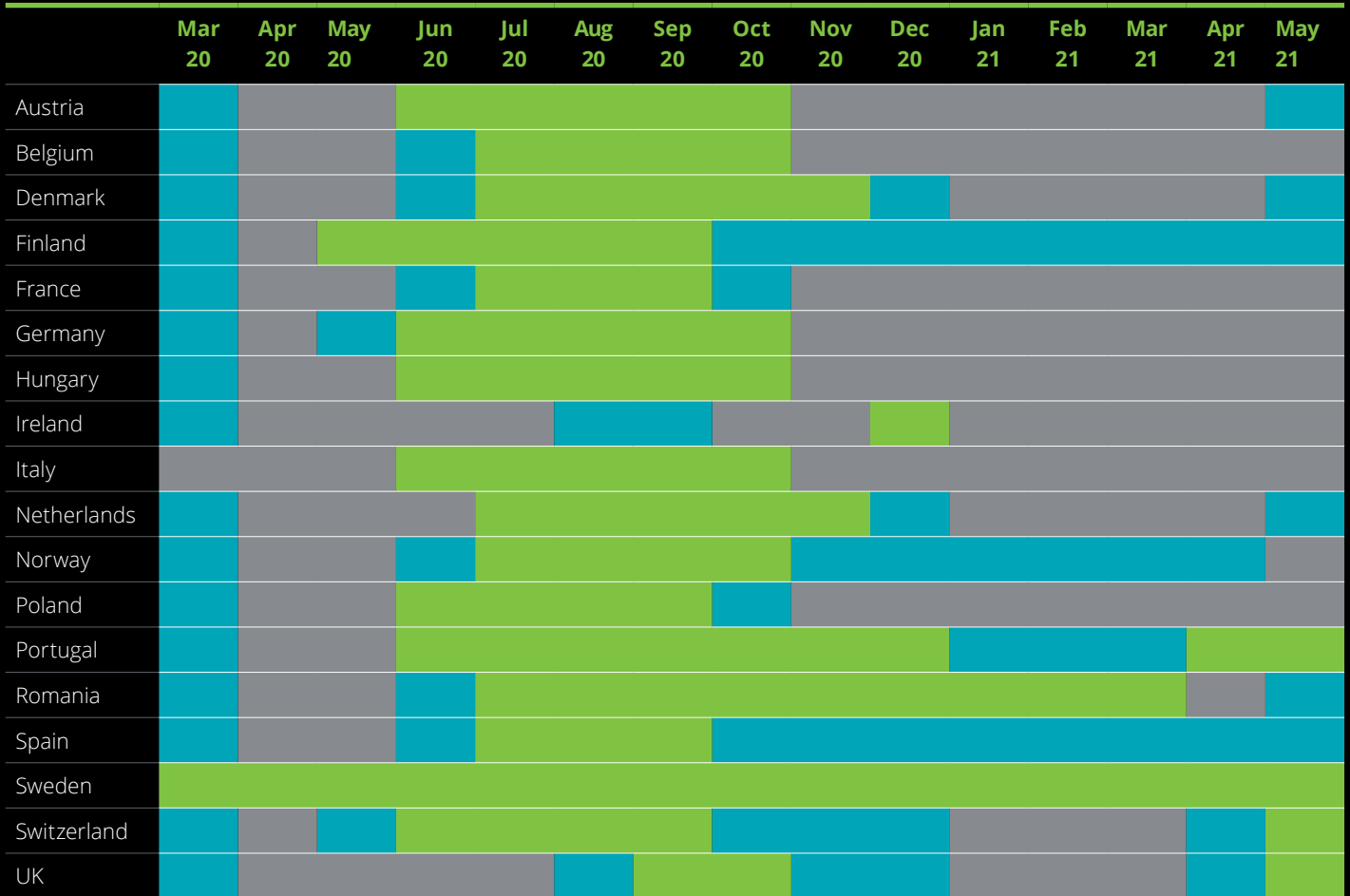


Fig. 1 – Schematic overview of opened and closed periods of fitness clubs in selected European countries

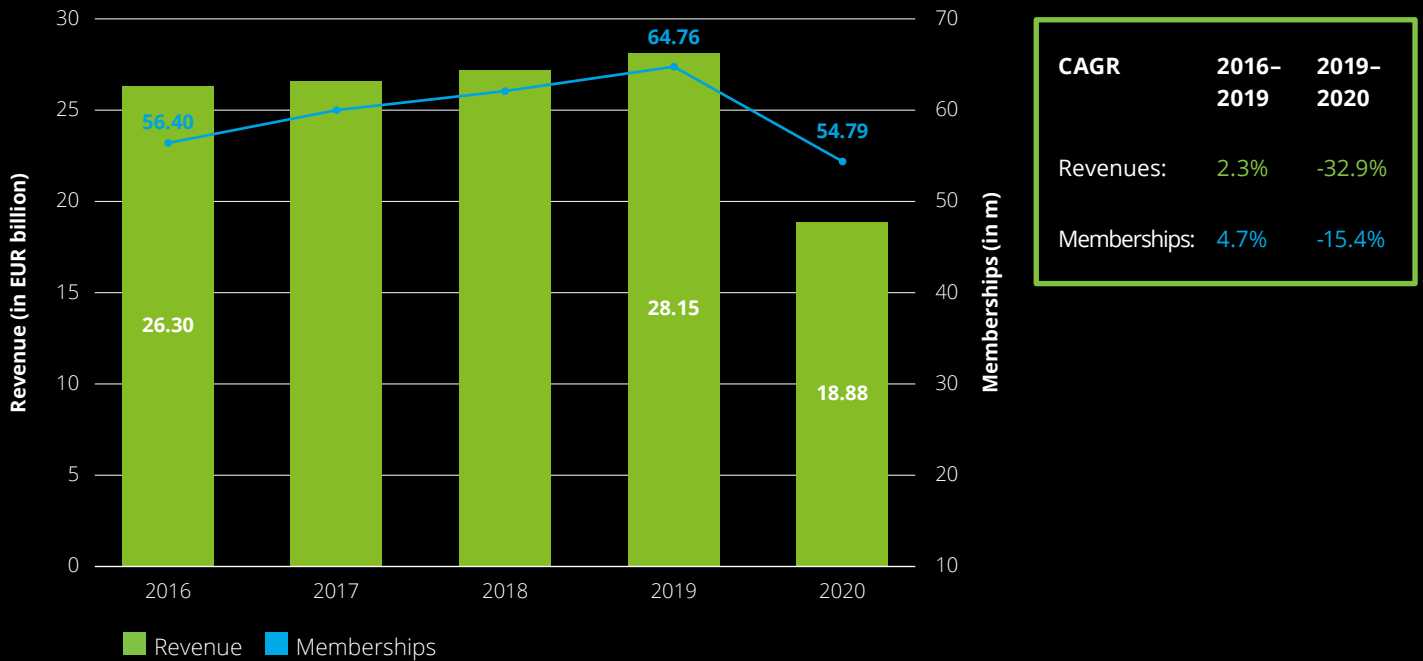


- Opened (under COVID-19-compliant circumstances)
- Club closures in significant parts of the country or of the month
- Nationwide club closures during the whole month

Simplified

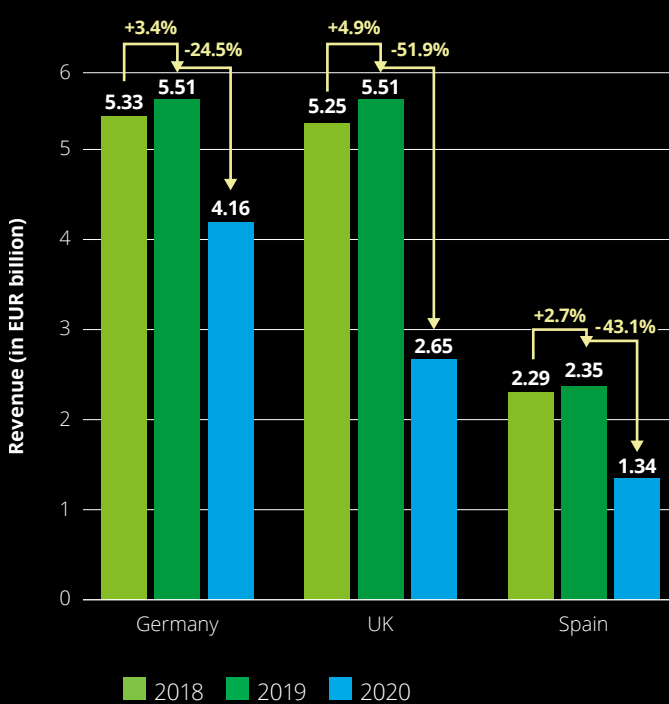
Source: Deloitte analysis

Fig. 2 – Development of revenues and memberships since 2016



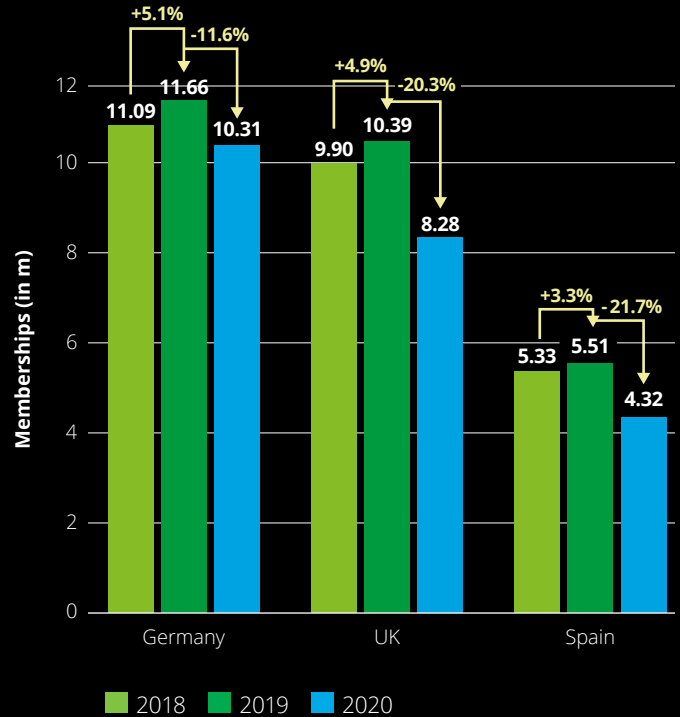
Source: Deloitte analysis

Fig. 3 – Revenue development in selected markets



Source: Deloitte analysis

Fig. 4 – Membership development in selected markets



Source: Deloitte analysis



Germany

Market insights

Until the COVID 19-related closures, the key figures¹ of the German fitness industry showed a sustained positive development. Between 2016 and 2019, an average annual revenue growth of 3.0% was achieved. During the same period, the number of facilities and memberships grew by an average of 3.6% and 5.0%, respectively.

However, as a result of the closures ordered by the authorities, the industry experienced a drop in revenue of 1.35 billion euros (-24.5%), reaching 4.16 billion euros in 2020. In terms of memberships, the net decrease of 1.35 million also represented losses in the double-digit percentage range (-11.6%). Although the membership decrease is at a lower level than that of revenues, the number of memberships dropped to a level that was initially reached between 2016 and 2017. This means that, based on a total of 10.31 million memberships, the penetration rate in the target group of people over 15 years fell from 16.2% to 14.4% (-1.8 percentage points), which also corresponds to the value recorded three to four years ago (14.9% in 2017 and 14.1% in 2016).

The number of clubs also decreased under the influence of the pandemic, after a steady increase in the density of the club network over the past decade. Although the decrease (-1,4%) was moderate in relation to the drops in revenue and memberships, 131 fewer facilities were counted compared to 2019.

Over the course of the year, fitness operators in Germany had to restrict their operations to varying degrees for a total of about four months in which the clubs had to close for major parts of the time. In a European comparison, this places Germany on average, with the country being comparatively less affected during the first lockdown in spring 2020. However, with the start of the second wave of infections at the beginning of November, the clubs again remained closed across the country for the rest of the year.

Among the largest German operators, some expanding companies experienced a distinct growth dynamic in recent years, which is why eight of the top 10 operators by number of clubs increased their number of clubs despite the pandemic. EASYFIT-NESS, for example, operates 10 clubs more than in the previous year (134 clubs in total) and therefore ranks among the top 3, also because Migros recorded a decline in facilities with a net decrease of 17 clubs (128 clubs in total). The second notable change in the ranking results from the formation of BestFit Group, which positions itself in eighth place following the merger of jumpers and Ai Fitness. The group, managed by the investment company NORD Holding, is mainly present in the west and south of Germany.

Together, the leading operators account for 40% of the total membership base. This list also includes premium and upper mid-market operators such as the franchise

operator INJOY (owned by Swiss-based Migros), Kieser Training, and LifeFit Group. The standard VAT rate is 19% with no discount on fitness services. In the second half of 2020, this general VAT rate, which also applies to fitness services, was reduced to 16% for a limited period until the end of the year to strengthen economic demand.

National Association

DSSV
Arbeitgeberverband deutscher Fitness- und Gesundheitsanlagen

Birgit Schwarze

www.dssv.de

Note: 1) It should be noted that the underlying data survey "Eckdaten der deutschen Fitness-Wirtschaft 2020", 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.

Fig. 17 – Leading regular operators by number of clubs

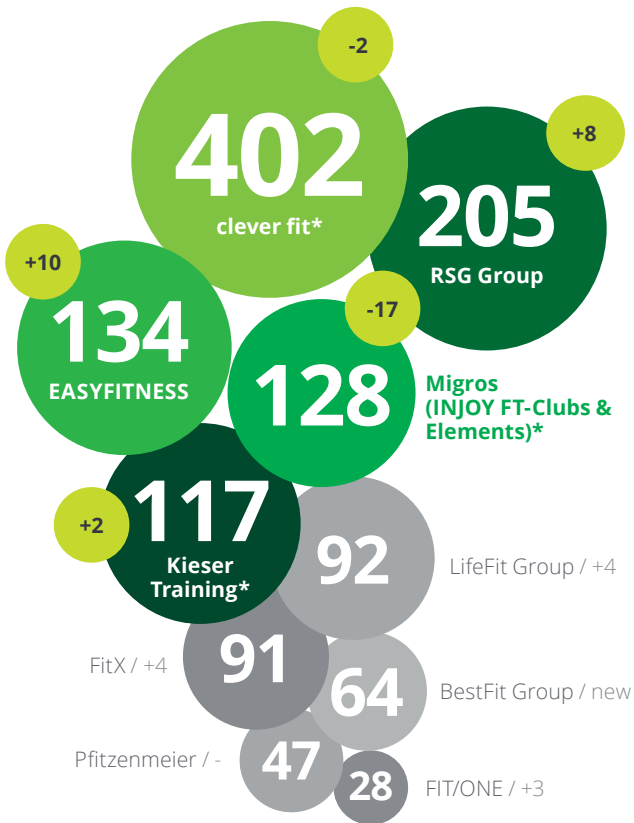
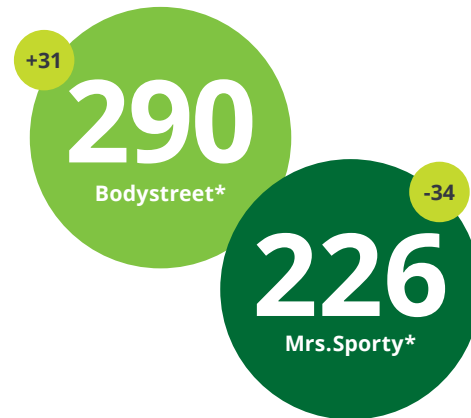


Fig. 18 – Leading micro-club operators by number of clubs



* fully or partly a franchise operation.

	2019	2020	
	Total population	83.0 m	83.2 m
	Population 15+	71.8 m	71.8 m
	Disposable income/person*	EUR 29,394	EUR 30,333
	% of population engaging in physical activity**	48.0%	48.0%
	% of population with fitness club membership	14.0%	12.4%
	% of 15+ population with fitness club membership	16.2%	14.4%
	Fitness club members (Market share of leading operators)	11,660,000	10,310,000 (40%)
	Number of clubs (Market share of leading operators)	9,669	9,538 (13%)
	Members/club	1,206	1,081
	Physically active people/club	4,121	4,185
	Total revenue (excl. VAT)	EUR 5,510 m	EUR 4,160 m
	Average membership fee/month (incl. VAT)	EUR 42.6	EUR 42.1
	Average membership fee as % of disposable income	1.7%	1.7%

* Population figures and data on disposable income relate to the respective previous year; ** Physical activity relates to people that are physically active with at least some regularity, according to the EU Commission's report "Special Eurobarometer 472: Sport and Physical Activity" published in 2018. Additional external sources: „Eckdaten der deutschen Fitness-Wirtschaft 2020“ (DSSV/DHfPG/Deloitte)

EuropeActive European Health & Fitness Market Report 2021

Report as of 31.12.2020

Publisher: EuropeActive

Authors: Herman Rutgers, Karsten Hollasch, Stefan Ludwig,
Steffen GausseImann, Christian Rump, Jakob Papenbrock

Publication date: June 2021

Price: EUR 299 (for EuropeActive members: EUR 149);

prices including VAT, please order via www.europeactive.eu

All rights reserved. Nothing in this publication may be duplicated, stored in an automated data file, or made public, in any form, whether electronic, mechanical, by means of photocopies or in any other way, without prior written consent from EuropeActive.

Your contacts



Karsten Hollasch

Partner
Head of Consumer Business
khollasch@deloitte.de



Herman Rutgers

Ambassador
EuropeActive
herman@hrutgers.eu



Stefan Ludwig

Partner
Head of Sports Business Group
sludwig@deloitte.de



Steffen Gausselmann

Manager
Sports Business Group
sgausselmann@deloitte.de

Deloitte refers to one or more of Deloitte Touche Tohmatsu Limited (“DTTL”), its global network of member firms, and their related entities (collectively, the “Deloitte organization”). DTTL (also referred to as “Deloitte Global”) and each of its member firms and related entities are legally separate and independent entities, which cannot obligate or bind each other in respect of third parties. DTTL and each DTTL member firm and related entity is liable only for its own acts and omissions, and not those of each other. DTTL does not provide services to clients. Please see www.deloitte.com/de/UeberUns to learn more.

Deloitte is a leading global provider of audit and assurance, consulting, financial advisory, risk advisory, tax and related services; legal advisory services in Germany are provided by Deloitte Legal. Our global network of member firms and related entities in more than 150 countries and territories (collectively, the “Deloitte organization”) serves four out of five Fortune Global 500® companies. Learn how Deloitte’s approximately 330,000 people make an impact that matters at www.deloitte.com/de.

This communication contains general information only, and none of Deloitte GmbH Wirtschaftsprüfungsgesellschaft or Deloitte Touche Tohmatsu Limited (“DTTL”), its global network of member firms or their related entities (collectively, the “Deloitte organization”) is, by means of this communication, rendering professional advice or services. Before making any decision or taking any action that may affect your finances or your business, you should consult a qualified professional adviser.

No representations, warranties or undertakings (express or implied) are given as to the accuracy or completeness of the information in this communication, and none of DTTL, its member firms, related entities, employees or agents shall be liable or responsible for any loss or damage whatsoever arising directly or indirectly in connection with any person relying on this communication. DTTL and each of its member firms, and their related entities, are legally separate and independent entities.



The Wellness Company™



LIVE LONGER AND BETTER

