

PRESS RELEASE

EuropeActive and Deloitte publish European Health & Fitness Market Report 2019

European fitness market continues to grow

Wednesday, 3rd April 2019. Cologne, Germany



- European health and fitness **club memberships grew by 3.5% to 62.2 million in 2018**, strengthening fitness as **the #1 sports activity in Europe**
- **Total fitness club revenues were €27.2 billion** (+3.4% at constant currency)
- **The number of facilities increased** by 4.6% to 61,984
- **Consolidation continues**; the top 30 European fitness club operators accounted for 15.4 million members (+11.2%), representing 24.8% of all memberships
- **Merger and acquisition activity reached a new high** in 2018 with 24 major M&A transactions in the operator market identified for this report

Today, at the 6th European Health & Fitness Forum (EHFF), Deloitte Partner Karsten Hollasch presented the major conclusions from the latest market research published by EuropeActive in cooperation with Deloitte. The EHFF is the annual top industry forum and the pre-opening event for FIBO, the world's largest fitness trade show, which takes place in Cologne, Germany from 4 - 7 April 2019.

According to the report, the European health and fitness market continued to grow strongly in 2018 as the total number of health and fitness club members increased by 3.5% to 62.2 million. With a membership growth of 4.5 % to 11.1 million members, Germany strengthened its position as the country with the highest number of members ahead of the United Kingdom (9.9 million), France (6.0 million), Italy (5.5 million) and Spain (5.3 million).

Top 5 European fitness markets by membership

Rank	Country	Membership	Growth (vs. 2017)
1	Germany	11,090,000	+4.5%
2	United Kingdom	9,900,000	+1.9%
3	France	5,960,000	+4.4%
4	Italy	5,460,000	+2.6%
5	Spain	5,330,000	+2.5%

Figures as of 31.12.2018 - Source: EuropeActive/Deloitte

Countries with the most members: Scandinavian

In terms of market penetration, Sweden ranks highest with 21.6% of the total population holding a fitness club membership. Other countries with high fitness club penetration include Norway (21.4%), Denmark (18.6%), the Netherlands (17.1%), Finland (17.0%) and the UK (14.9%).

Overall, 7.8% of the total population were health or fitness club members, with a penetration rate of 9.4% for people aged 15 years and older. Thus, the high penetration rates in most Northern and Central European countries were partly offset by lower market penetration in many Southern and Eastern European fitness markets.

With 1.95 million members, McFIT GLOBAL GROUP remained atop the European membership ranking ahead of Basic-Fit (1.84 million), which reported the highest absolute year-on-year membership growth in the market (+316,000), as well as Pure Gym (1.01 million), The Gym Group (0.72 million), and clever fit (0.72 million).

Top 5 European fitness club operators by membership

Rank	Operator	Membership	Growth (vs. 2017)
1	McFIT GLOBAL GROUP	1,950,000	+12.7%
2	Basic-Fit	1,840,000	+20.7%
3	Pure Gym	1,012,000	+9.2%
4	The Gym Group	724,000	+19.3%
5	clever fit	720,000	+16.1%

Figures as of 31.12.2018 - Source: EuropeActive/Deloitte

Operator Top 3

In terms of revenues, the UK-based premium operator David Lloyd Leisure (EUR 545 million), low-cost operator Basic-Fit (EUR 402 million) and the Swiss operator Migros Group (EUR 383 million) led the European operator rank. Herman Rutgers, EuropeActive Board member and co-author of the report, commented: "2018 was another year of continued

growth for the sector. It was interesting to see positive developments across all market segments; value, premium as well as some mid-market operators. Additionally, we saw more small and medium-sized facilities opening closer to where people live and work, making fitness even more accessible for all. We remain confident to reach the industry goal of 80 million members by 2025.”

The European Health & Fitness Market Report 2019, the 8th joint publication of EuropeActive and Deloitte, represents the most comprehensive report on the European health and fitness market and serves as a valuable source of information for industry stakeholders. This report was made possible by the generous support of Basic-Fit, Exerp, FIBO, Gympass, IHRSA, Technogym and YANGA Sports Water.

The full report (168 pages) is available for € 299 (EuropeActive members only € 149) and can be ordered via EuropeActive’s Knowledge Centre at <https://europeactive.blackboxpublishers.com/en/publications/european-health-fitness-market-report-ehfmr-2018/>

About the European Health & Fitness Market Report

The European Health & Fitness Market Report, which is published annually by EuropeActive in cooperation with the audit and consulting firm Deloitte, represents the most comprehensive analysis of the European health and fitness industry. Besides key figures and detailed profiles of the top 30 European fitness club operators, the report includes profiles of the 19 largest national markets, analyses of merger and acquisition activities, EU policy implications and the global equipment market, as well as interviews with five leading executives from the fitness industry. In addition, a chapter on fitness intermediaries and other key market trends and drivers has been included in this report.

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About EuropeActive

EuropeActive is the not-for-profit organisation representing the entire European health and fitness sector in Brussels.

In 2018, the European health & fitness sector served over 62.2 million consumers, generated EUR 27.2 billion in revenues, employed about 650,000 people, and consisted of approximately 62,000 facilities. Alongside its significant economic contribution, the industry plays a major role in creating a more active and healthy Europe. EuropeActive’s ambition is to reach 80 million health and fitness club members by 2025.

EuropeActive currently represents more than 25,000 fitness clubs and 21 national associations, together with market-leading suppliers, education providers and individuals. For further information, please visit www.europeactive.eu or contact:

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