



Current trends in the European health & fitness sector – Where do we go ?

Idraettens Analyseinstitut Congress
Vejen, November 25, 2014

Herman Rutgers



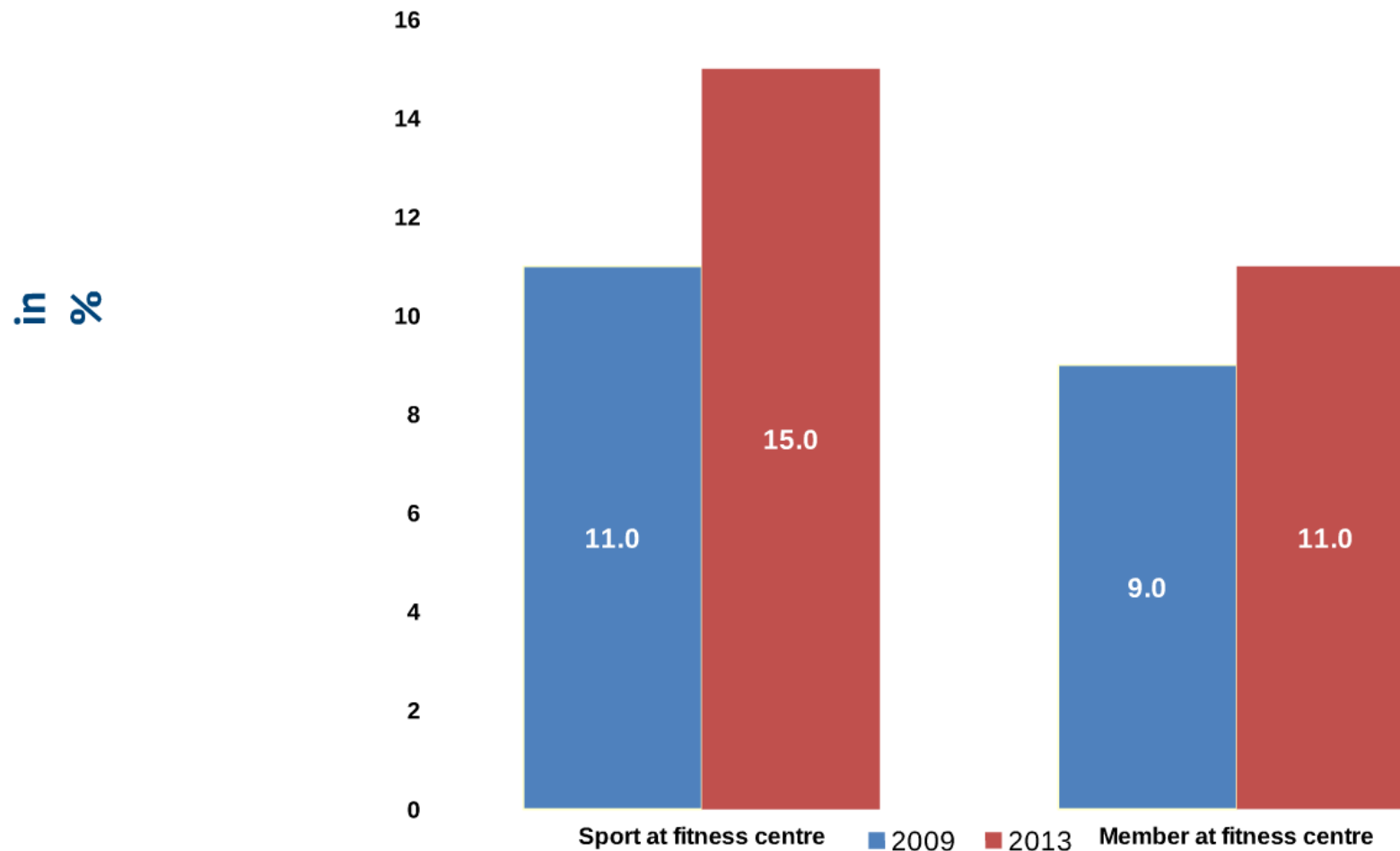
YouTube

- Fitness Market in Europe
- Key Trends
- Some front runners / losers
- Impact Technology / Innovation
- EuropeActive 80 MM by 2025
- Greatest challenges



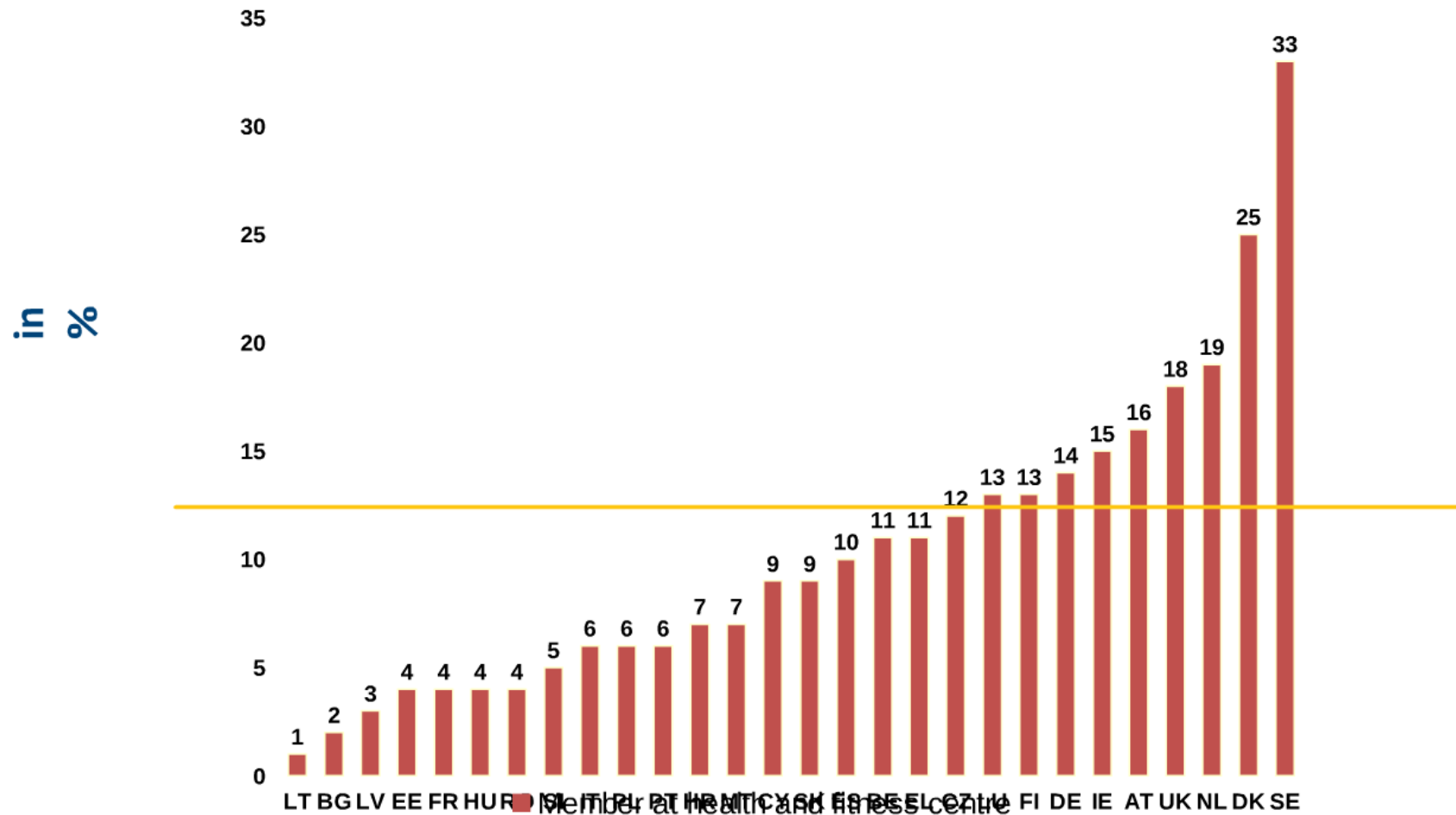
EUROBAROMETER 

Sports participation in European health and fitness centres grew 36% (2009 to 2013)



Source: Special Eurobarometer 2013 „SPORT AND PHYSICAL ACTIVITY“

Eurobarometer results show highest participation in Denmark and Sweden



EHFA/Deloitte The European Health & Fitness Market

Source: Special Eurobarometer 2013 „SPORT AND PHYSICAL ACTIVITY“

Fitness #1 Sport in EU !



membership ; 15 % participation!

Eurobarometer 2013;

Fitness Membership;

11% EU average - was 9% in 2009

31% SE

20% DK

19% NL (GfK 2014; 350.000 more; #1 sport+)

18% UK

14% DE

4% FR



European Health & Fitness Market

Report as of 31.12.2013



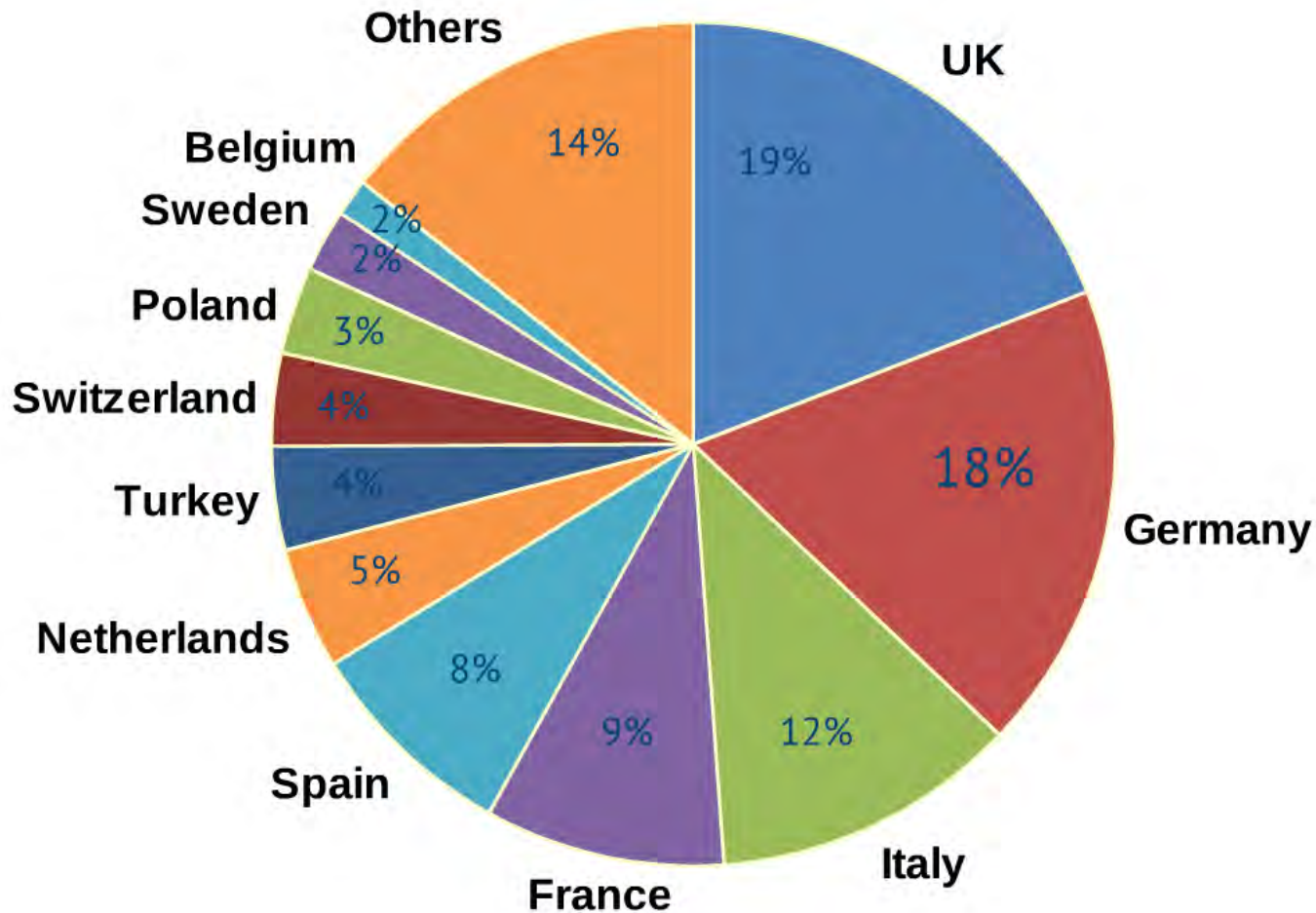
Deloitte.



EU fitness market

- 46 mm members
- 400.000 employees
- €25.3 bn revenues (football €16 bn)
- 46.500 facilities

European Fitness Mrkt 2013; € 25,3 MM (+ 4,5%)



What "business" are we in ?

- Fitness
- Training
- Health
- Wellness
- Beauty
- Weightloss
- Behavioral Change
- Third Space



April 8, 2014, Cologne





THE FUTURE OF HEALTH & FITNESS

A **PLAN** FOR GETTING
EUROPE ACTIVE BY **2025**

Agenda Vision 2025

- >Investment in People at all levels
- >Professionalize our “Delivery Army”; EREPS – Register development
- >Better marketing and positioning of sector (benefits > price....!)
- >Establish Healthcare connection; Fitness as delivery partner in battle against life style diseases
- >Market and Medical research; national / EU projects
- >Consumer Campaigns (convince the 60 % non-active population)
- >Embrace new technologies; constant innovation
- >Development of strong National Associations; Cooperation !

Enormous potential

20% “Believers / self motivated”

20% “Couch potatoes”

60% “To be convinced”



Fitness market key trends



"Boutique" clubs



Functional and strength training



Franchising



Healthcare and Corporate connection



Budget clubs



Premium segment

SOULCYCLE®

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about soul

SoulCycle's full-body workout has revolutionized indoor cycling and taken the world of fitness by storm. Combining inspirational coaching and high-energy music, SoulCycle offers an engaging workout that benefits both the mind and the body.

Each SoulCycle ride delivers an intense FULL-BODY workout with a fun and energizing atmosphere. Not only do riders burn calories and get their hearts pumping, but using the SoulCycle® Method, riders also work their core and use hand weights to tone their upper bodies. In all of our studios, we ensure that SoulCyclists are treated to the country's best instructors and staff, trained to deliver unique services and personal attention to all levels of riders.

In select studios, we also offer SoulBands, our REVOLUTIONARY class that challenges the entire body by using resistance bands that hang above each bike. The 60-minute workout includes several anaerobic intervals and trains the WHOLE body, toning the abs, obliques, shoulders, triceps, biceps and back - all while maintaining fat-burning cardio levels.

Beyond providing an intense cardio workout, SoulCycle also incorporates a mental component of inspirational coaching. By keeping the lights low and riding by candlelight, SoulCycle creates a cardio sanctuary where riders can come to clear their heads.

So what are you waiting for?

Take your journey. Change your body. Find your soul.

[CLICK HERE TO GET STARTED](#)



04:40 pm

iPad

Fitness market key trends



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Fitness market key trends



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Franchising



Healthcare and Corporate connection



Budget clubs



Premium segment



Retention

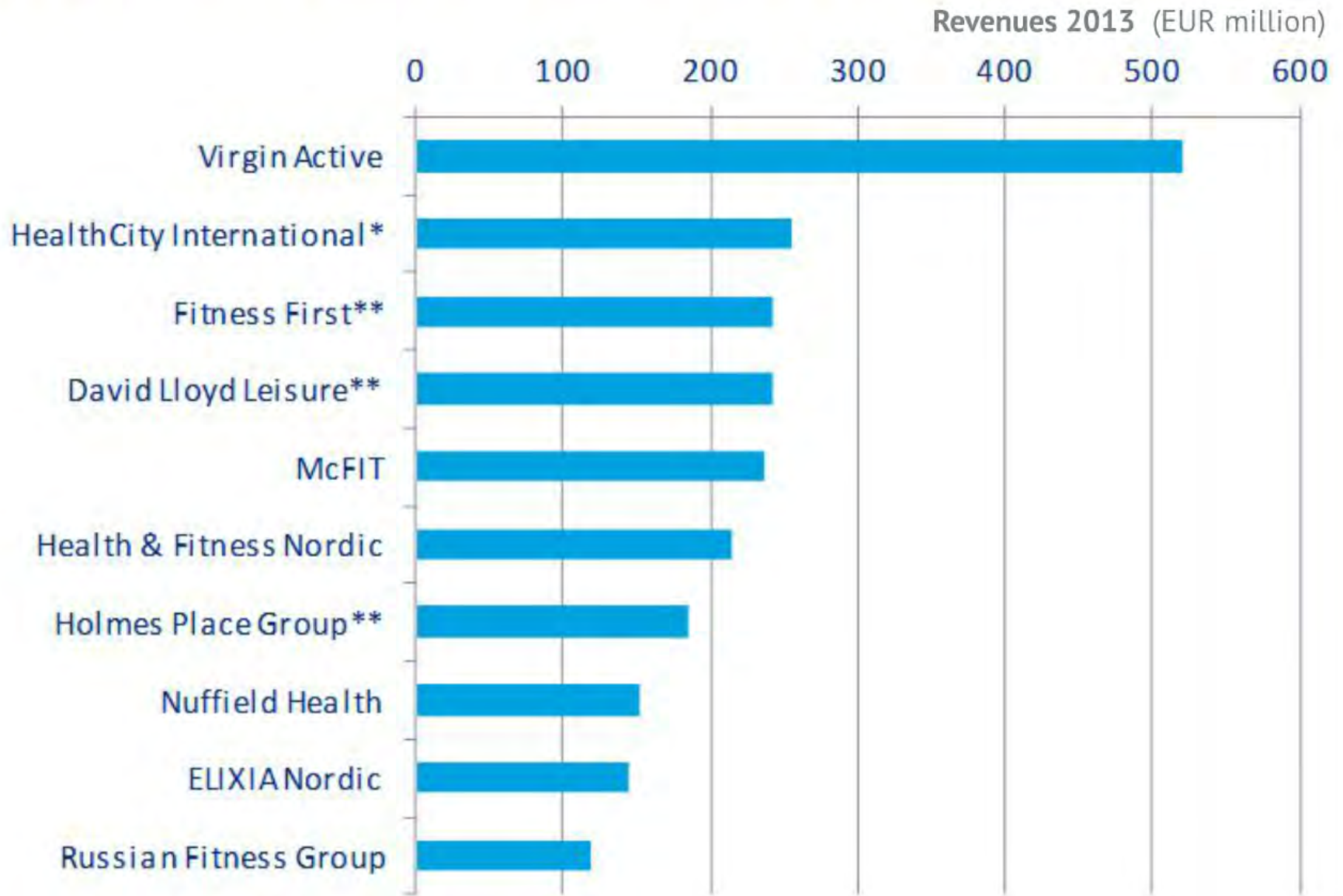


Price and margins (differentiation!)



Consolidation

Virgin Active Market Leader in Europe: € 520 million



Note: * based on price estimates; ** based on historic revenues



VIRGIN ACTIVE HEALTH CLUBS

GLOBAL PORTAL

live happily ever active around the world

AFRICA



South Africa

112 clubs ▾

EUROPE



Italy

28 clubs ▾



Spain

11 clubs ▾



Portugal

4 clubs ▾



UK

101 clubs ▾



Australia

4 clubs ▾



Singapore

1 club ▾



Thailand

1 club ▾

ASIA PACIFIC

1.2 million
MEMBERS

262
CLUBS

With more than **1.2 million members** across over **270 clubs** globally, and with more clubs opening in Europe over the next few years, we are a recognised global brand.

We pride ourselves on delivering **excellent customer service**, **challenging the norm**, and offering an **innovative, value-for-money** health club experience.

Virgin Active is a frontrunner

- Strong branding & marketing
- Strength of global spread & size
- Clear up-market position; “country club in the city” > Family orientation
- Big variety activities; Strong Spa, wellness area
- Focus on the customer needs
- Own Academy for staff development
- High share non-dues revenues
- Big clubs; average members/club; 3.800
- Strategic acquisitions
- Good management (same CEO for 10 years; double digit growth in top and bottomline)

Nuffield Health

Your personal health service

Hospitals

Fitness & Wellbeing Gyms

Physiotherapy

Health Assessments

Corporate Wellbeing

Drs & AHPs

What are you looking for today?

I want to ...

Find a gym

Find a hospital

Find a consultant

Find a treatment

Find a physiotherapy clinic

Choose a centre

Search by postcode

Enter your postcode

5 miles

Search

Get your FREE 1-Day Pass

Try us for Free

NEW

BOOK YOUR
PHYSIOTHERAPY
APPOINTMENT ONLINE

Men's Health
Keeping you fit
and well

Find out more >



There's no need to wait
for hospital treatment
Get the treatment you need
in days not months

New Sites

Virgin Active
Members Information



Choose a centre

Search by postcode
Enter your postcode

5 miles

a class timetable

a health clinic

- [Health MOT](#)
- [Health Assessments](#)
- [Class Categories](#)
- [Swimming Lessons / Pools](#)
- [Sauna, Steam & Spa](#)
- [Squash Courts](#)
- ['Nuffy Bear' Day Nurseries](#)



Find out how we can get you fitter and healthier with Nuffield Health.

Our Gyms - 3 easy steps to your rewards

1. Free 12-point Health MOT from a clinically trained Wellbeing Advisor or Health Mentor
2. Receive a personalised gym programme to get you on track and help you reach your fitness objectives
3. After 3 months, get another Health MOT. If you have improved or maintained your health we'll give you rewards worth at least £100 for you to redeem.

Our rewards include:

- Free month's membership
- Free personal training session
- Free guest passes.

Fitness Membership

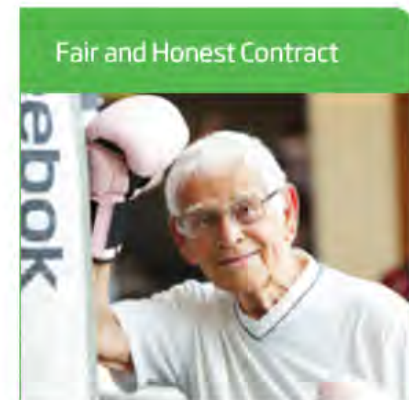
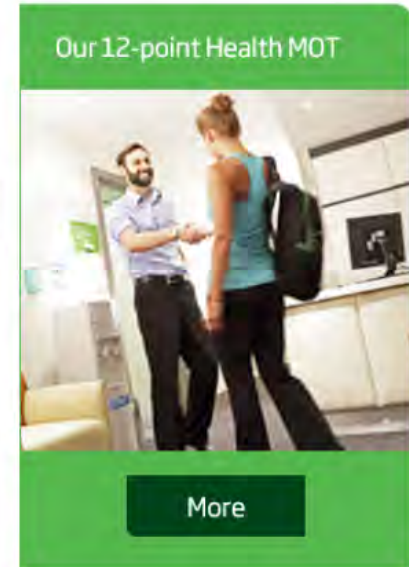
Our Fitness Membership gives you access to great fitness facilities and professional health care services to support you in a healthy lifestyle. Prices based on 12 a month membership.

- Free Health MOTs i
- Personalised Exercise Programme i
- Meet Our Experts Events i
- Get Healthy, Get Rewarded i
- A Fair & Honest Contract i
- Optional - Nuffield HealthScore™* i
- Optional - Connections Membership** i
- Flexible Gym Contracts i

Wellbeing Membership

Our new Wellbeing Membership provides you with extra expertise, personalised support and motivation to help you achieve all your health and fitness objectives during 2014.

- Free Health MOTs i
- Personalised Exercise Programme i
- Meet Our Experts Events i
- Get Healthy, Get Rewarded i
- Fair & Honest Contract i
- Nuffield HealthScore™* i
- Unlimited Connections Membership** i
- 12-Month Contract i
- + x9 Health Mentor Sessions i
- + x4 Expert Sessions i





“There is huge potential and a lot of energy in the Health & Fitness Nordic operations.”



Welcome to Health & Fitness Nordic

Health & Fitness Nordic (HFN) is the Nordic region's leading and largest provider in the health and fitness sector. The Group's companies offer various training options, in addition to providing future instructors with education in training and nutritional guidance. By mid 2014, HFN had 545,000 members in more than 200 training clubs in highly populated cities in Norway, Sweden, Denmark and Finland.

Principal owners of HFN is Altor (51%) and TryghedsGruppen (49%). The owners have a shared vision for the continued development of the fitness industry in the Nordic countries.

Latest report



2012 Annual Report

[Download \(PDF\) »](#)
[View on screen »](#)

SATS ELIXIA

fresh
FITNESS

Metropolis

safe

Frontrunner HFN

Largest operator in the Nordics,
nr. 2 in Europe

Strong cluster strategy in capital cities

Successful merger between SATS and Elixia

Multiple Brands / Price categories

Sophisticated Website & Apps

Innovation in Training & Equipment

McFit ; The Makeover of another frontrunner



The image shows a screenshot of the McFit website. At the top left is the McFit logo. The navigation bar includes: News, Konzept, Training, Ernährung, Erfolg, Studios, Soziales, Community. The main content area features several articles and a large image of a muscular man (Murat) in a white shirt. A yellow oval highlights the subscription price: 24 Std. geöffnet, 16,90 € pro Monat. The bottom of the page has a footer with contact information and a small disclaimer.

McFit

Einfach gut aussehen.
EINFACH GUT AUSSEHEN™

News Konzept Training Ernährung Erfolg Studios Soziales Community

Mitglied des Monats
Murat ist unser McFit-Mitglied des Monats Mai!
[Erfahre mehr...](#)

Wow! McFit hat 600.000
Im April begrüßte McFit das 600.000 Mitglied: Karin aus Bochum.
[Und das hat Karin erlebt](#)

Die McFit EM-Umfrage
McFit sucht mit euch den Fußball-Europameister 2008.
[Stimmt jetzt ab!](#)

Wer schön sein will, muss lesen!
Dein McFit-Magazin
Die 2. Ausgabe ab 5. Mai in deinem Studio! Das coole Fitness- und Lifestylemagazin von McFit. 96 Seiten „Einfach gut aussehen“ plus das „Mitglied des Monats“ in einer exklusiven Fotostrecke. Informativ, abgefahren, sexy – nur für dich!
[Erfahre mehr...](#)

Jetzt reinblättern

Mitglied des Monats
Murat
Studio Köln

24 Std. geöffnet **16,90 €** pro Monat

Kontakt Unannehmlichkeiten Presse Impressum / AGBs

© 2008 McFit. Alle Rechte vorbehalten. * Bei einer Mindestvertragslaufzeit von 12 Monaten, wenn keine andere Fristen über 14 - 9 Uhr, Mo - Sonntag.

McFit: reinventing itself



[TRAINING](#) [STUDIOS](#) [PROBETRAINING](#) [MITGLIED WERDEN](#)



DAS TRAINING BEGINNT.

[ERLEBE TRAINING](#)

[HOME](#) > 404 SEITE NICHT GEFUNDEN

SEITE NICHT GEFUNDEN

Hallo lieber Website-Besucher,

die von dir gesuchte Website ist gerade nicht da. Wo sie sich aufhält, wissen wir leider nicht. Vermutlich trainiert sie im McFIT-Studio, um für die tägliche Belastung gerüstet zu sein.

Eventuell hast du dich auch einfach nur verschrieben. Bitte überprüfe noch einmal die von dir eingegebene Webadresse (URL).

A close-up, high-angle shot of a man's face, looking directly at the camera with a serious expression. His skin is slightly damp. A large, semi-transparent play button icon is centered over his eyes. The hashtag "#MACHSCHWAHR" is written in a bold, yellow, hand-drawn font across the middle of the image, with the play button icon overlapping the letter 'S' in the middle.

#MACHSCHWAHR

You Tube

McFit; LOOX magazine and Portal



Anmelden

Der perfekte Plan für Training & Ernährung



Das LOOX Portal entdecken

Hier findest du die wichtigsten Funktionen im Überblick.

Jetzt ansehen

Pläne



Experten



LOOX App



Technology; today and in the future

Airlines; 90% of bookings online

Hotels; USA 80% online
FR 90%

Shoes; in EU 10% sold online > industry expects 35% in 2020

Fitness is catching up fast...

PERSONAL HEALTH TRACKING APPS

USAGE LOW BUT INCREASING

Which of the following kinds of apps do you use at least once a month?

Personal health-tracking apps eg calorie counters, running route markers | 2013



Source: nVision Research | Base: 5,000 online respondents aged 16+, GB, 2013



geekwire gala | December 3 | Tickets on sale now

shareBUILDER 401K Capital One

Which Cat is the Cutest?



\$199 Microsoft Band launches as flagship device for new Microsoft Health data platform

BY TODD BISHOP on October 29, 2014 at 8:44 pm

Comments 38

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Share

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Reddit



Microsoft is launching a new fitness and health tracker called **Microsoft Band** for \$199, along with a new platform called **Microsoft Health**, which the company says will be able to collect data from a variety of wearable devices to give users insights into their personal health.

The system will work in conjunction with apps

UW Online
Join Us Any Time,
everywhere

Learn More >>

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UNIVERSITY of WASHINGTON

Featured Sponsor

[See More](#)



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UNIVERSITY of WASHINGTON



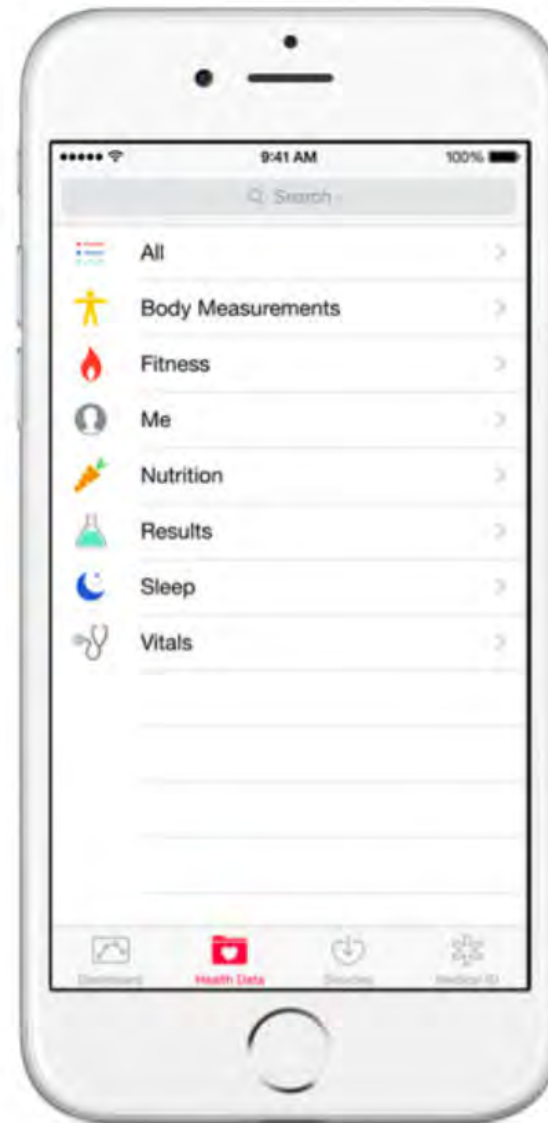
YouTube

“How are you?” now has a really accurate answer.

Heart rate, calories burned, blood sugar, cholesterol — your health and fitness apps are great at collecting all that data. The new Health app puts that data in one place, accessible with a tap, giving you a clear and current overview of your health. You can also create an emergency card with important health information — for example, your blood type or allergies — that’s available right from your Lock screen.



See your whole health picture.



Manage what you're tracking.

Jawbone, Fitbit, AppleWatch, etc....

JAWBONE JAMBOX UP HEADSETS STORE

Support | Sign In



INTRODUCING **UP²⁴** AND THE NEW **UP 3.0** **APP**

Connect wirelessly with real-time insights to turn intentions into actions.



[UP System](#)

[UP24](#)

[UP](#)

[The App](#)

[UP Features](#)

[Specs >](#)

[FAQ >](#)

[SHOP UP BANDS](#)

THE UP SYSTEM

More than a band. More than an app. An



Min träning

Info

Användarnamn

Lösenord

Håll mig inloggad

Har du glömt ditt lösenord?

Logga in

Eller logga in med  Google  Facebook

BLI MEDLEM IDAG



Du får SATS You™, vårt unika 8 veckors träning- och kostprogram på köpet.

[Bli medlem online](#)

Mer än träning!

- Introduktionsprogram med 3 PT-tillfällen
- Tränings- och kostprogram
- Träningsdagbok för all din träning

Allt detta och mycket mer ingår när du blir medlem.

[> Välkommen – bli medlem idag!](#)



TESTA - Vilken träning passar dig?

Kondition

Styrka

Rörlighet

Balans

Spänst



SeniorYoga ★★★★★



SatsCore ★★★★★

JUST NU PÅ SATS



I KORTHET



Vill du arbeta med träning?
22 okt Vi har utbildningen

484

SATS PÅ FACEBOOK



Anna Forsberg
Hej! Hur ofta tvättar ni vana/stretchmattorna? Och hur

Conclusions



- ❑ Market is still in full development – far from saturated
- ❑ Further Consolidation ahead
- ❑ Growth opportunities in all price segments
- ❑ Establish Health Connection / Positioning
- ❑ Quality of Staff > Customer Service > Results
- ❑ Improve Operational Efficiency
- ❑ Promote Benefits, not Price
- ❑ Innovation is driver for growth
- ❑ Segmentation / Positioning vital for survival

The future looks
good....

If you are faster
& smarter than
the competition!



Thank You...



europa**active**

MORE PEOPLE | MORE ACTIVE | MORE OFTEN

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