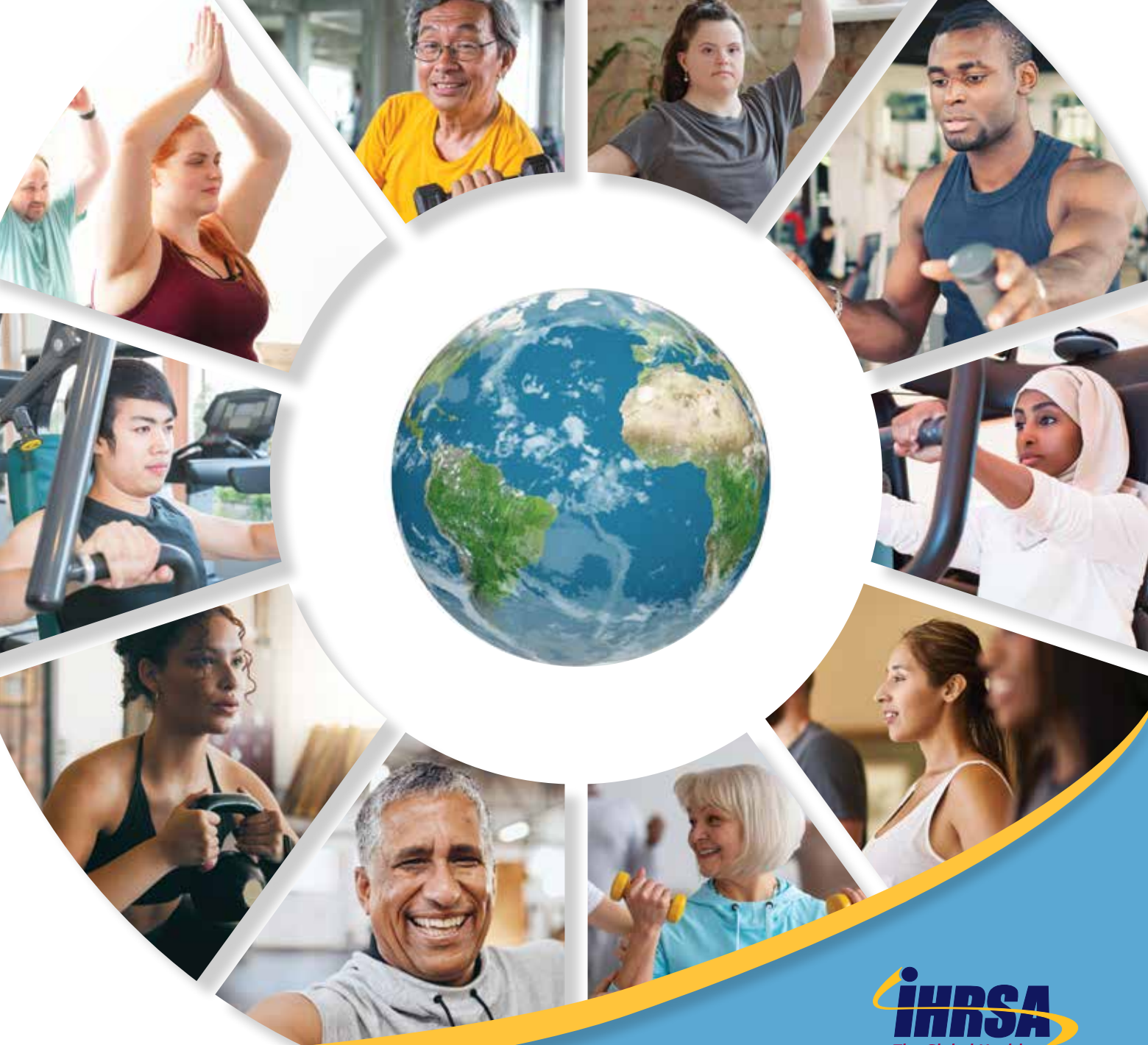




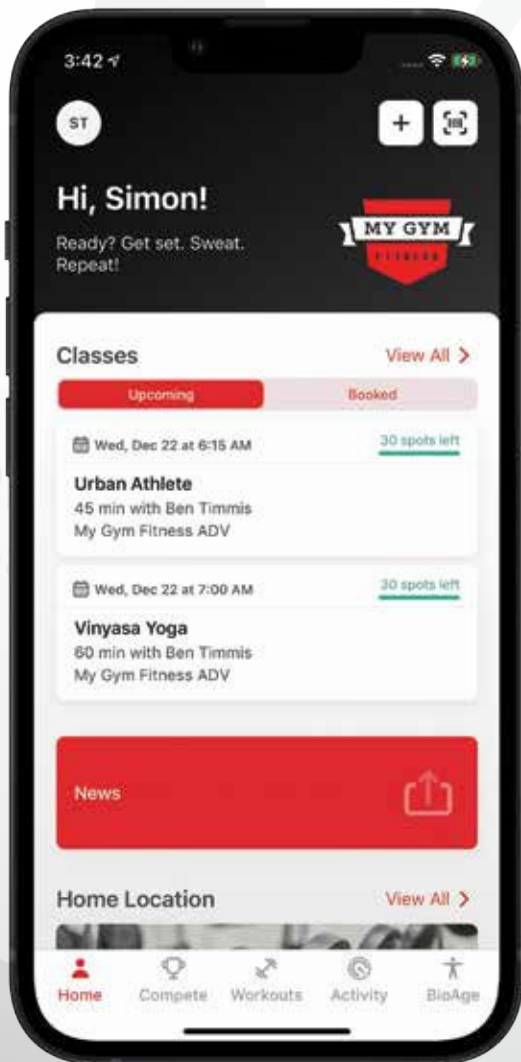
2023 IHRSA Global Report

Data and Insights on the **Health and Fitness Industry**

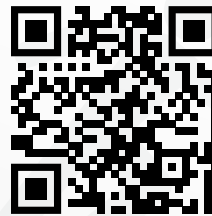
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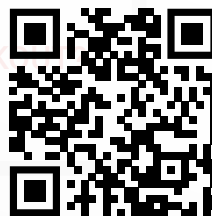
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In this dynamic climate, there is one constant: optimism. Whether large or small, or whether in yoga, Pilates, high-intensity training, or a full-service fitness center, our industry's leaders are optimistic about the present and bullish on the future.

Their members have given them good reason to be this way. Consumers increasingly understand how important physical activity is to their physical and mental health. The growing number of fitness facilities that offer a place for working out as well as for working and socializing provides just one example of how this focus is evolving the industry.

Investors are taking note, governments are taking note, and franchisors are taking note.

The goal of the *IHRSA Global Report* is to document the trajectory, perspectives, trends, and data of this global industry. This year's report includes insights gleaned from a survey of IHRSA member clubs and studios, an overview of the biggest news and challenges in the industry from the past year, and a list of some of the largest club and studio brands around the world revealing location, membership, and revenue numbers for many of them.

This year, we also added in-depth perspectives from federation leaders and industry partners highlighting industry and economic trends plus outlooks for 15 countries and two regions of the world. Two research data firms also shared their insights as did two industry data and software companies.

We appreciate the contributions of all these individuals and the survey respondents. Your efforts helped make this year's report the most robust in many years.

Regards,

Liz Clark

President & CEO, IHRSA

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BY JIM SCHMALTZ,
EDITOR-IN-CHIEF, CBI

THE GLOBAL HEALTH AND FITNESS INDUSTRY RESTORES MUCH OF ITS LUSTER, BUT CHALLENGES REMAIN

A growing sense of normalcy—with the uncertainty of a changing marketplace

A year ago, we reported that the global health and fitness industry was still rebuilding after the tumult of the years-long pandemic. Today, however, the outlook is more positive, as once again, it has demonstrated resilience when faced with social and economic circumstances beyond its control. As many predicted, members continue to return to clubs and studios in large numbers.

At the same time, not all fitness businesses are reporting their pre-pandemic numbers yet, as the global recovery has been uneven—as one might expect. What's more, the war in Ukraine continues to have repercussions throughout Europe.

Still, the overall trend is moving in the right direction in most regions of the world. The recovery is becoming more uniform in its scope.

In the United States, for example, some research firms have reported a noteworthy increase in attendance. Placer.ai, which measures retail traffic in brick-and-mortar businesses and website visits, released its results for April 2023. Compared with April 2022, Placer.ai noted the following foot traffic trends for these major brands:

- Club Pilates: **+25%**
- Crunch Fitness: **+20%**
- Planet Fitness: **+15%**
- LA Fitness: **Even**
- Pure Barre: **Even**

The technology giant Garmin released its “Year in Review” of fitness and wellness statistics compiled from the Garmin Connect tracker and app.

The company said, “We found within the data a return to pre-pandemic fitness habits—with strong growth in indoor activities that can’t be performed at home ...”

One of the largest increases was in strength training activities, a jump of 20%, according to Garmin. This increase has been confirmed statistically and anecdotally by club operators all over the world.

HV/LP and Luxury Lead the Resurgence

The business model that seemed to gain the most over the last year was high-value, low-price (HV/LP) facilities. The leader in the category, Planet Fitness, continued to post record profits. For second quarter 2023, the company reported revenue increased by \$62.5 million from the same quarter in the prior year for an overall total of \$286.5 million.

Planet Fitness also experienced growth in the number of units and now boasts 2,472 locations that serve more than 18.4 million members. Further, second quarter 2023 was the company’s eighth straight quarter with lower year-on-year cancellation rates.

“All generational groups have surpassed their pre-pandemic penetration levels, and more members are working out more frequently,” Planet Fitness CEO Chris Rondeau said in a statement.

Other HV/LP brands—including Blink Fitness, EoS Fitness, VASA Fitness, Vivagym, Basic-Fit, and PureGym—enjoyed similar gains, supporting the notion that lower-priced clubs have been finding a larger audience among post-pandemic populations.

And now, many of these brands are experimenting with an HV/LP 2.0 model that starts memberships at a low basic rate (often \$10 monthly), then adds a variety of enhancements, and increases monthly dues to a variety of price points—\$29.95 to \$49.95—depending on the company and the offerings.

Luxury and high-end brands, such as Life Time, Equinox, VIDA Fitness, and Bay Club, also continue to experience a post-Covid

resurgence. However, in an analysis by Redwood Advisors, clubs priced between the HV/LP and the luxury market continue to struggle. “Many mid-priced gyms, typically those with membership fees around \$50, have meanwhile struggled to find their footing in the post-pandemic world,” they write.

Still, some brands in this category continue to grow. One is U.S. brand Genesis Health Clubs, which has been acquiring properties, growing to more than 60 locations in six states.

Another major mid-priced brand that’s been enjoying impressive growth both in locations and membership is Anytime Fitness, the 24/7, 365-day-a-year-gym. The linchpin of Self Esteem Brands (SEB), which has enjoyed other successes over the last year, Anytime Fitness is frequently cited as one of the fastest-growing franchises in the world with more than 5,000 locations worldwide in 42 countries.

SEB continued its aggressive push into new markets with its Basecamp Fitness brand, which has 19 locations in 10 states with plans to open studios in Nevada, Florida, Kansas, New Jersey, California, and Washington. The company also is extending Basecamp with the launch of a twin brand, SUMHIIT Fitness, which is being rolled out into markets in Asia-Pacific. SEB plans to open 200 Basecamp and SUMHIIT locations by 2026.

As its footprint increases, so does the roster of master franchisors that continue to build the brand and its bottom line from Asia to the U.S. Already with a heavy presence in Asia-Pacific, Anytime Fitness granted a new master franchise agreement in France in 2023.

Overall, same-store sales across SEB franchise locations are 10% higher than the first half of 2022, exceeding a goal of 7.4% with membership attrition at an all-time low.

Workout Anytime, which features a similar concept as Anytime Fitness, has also been experiencing impressive growth. With nearly 200 units across the U.S., the company plans to open 30 new locations this year, targeting Alabama, Arizona, Arkansas, Virginia, New Jersey, West Virginia, Ohio, Missouri, and Iowa.

Leading Studio Brands Rebound

Perhaps the hardest-hit business model during the pandemic was the studio model, a segment that tends to be more vulnerable to market downturns. IHRSA reported that approximately 30% of studios in the U.S. closed permanently in 2021 due to the crushing impact of the pandemic. According to the 2022 *IHRSA Health Club Consumer Report*, studios lost nine million members—a decline of approximately 22%—from 2019-2021.

Fortunately, things have changed since those grim statistics were tabulated. Today, boutique fitness accounts for 42% of all gym memberships with an estimated growth of 17% by 2025 and a compound annual growth rate of 10.6%, projected for 2021 to 2028. What’s more, many studio members choose to belong to both a studio and a traditional multipurpose health club.

Leading the charge in the studio market segment is Xponential Fitness. Although Xponential has had to contend with a challenge from a stock-monitoring company that questioned its numbers, Xponential reported robust growth in its second quarter 2023 earnings call.



Xponential CEO Anthony Geisler said in a statement, “Total members across North America saw growth of 29% year-over-year to a total of 697,000 at the end of the second quarter. North American studio visits for the second quarter increased by 32% year-over-year, reaching a total of 12.9 million. This drove record North American systemwide sales of \$341 million, which represents a 37% increase over the second quarter of 2022.”

This strong performance is one reason that Xponential was featured in *Entrepreneur* magazine’s latest New & Emerging Franchises list, its Fastest-Growing Franchises list, and its Global Franchises List.

[solidcore] is another fast-riser in the studio category over the last year. Under the direction of CEO Bryan Myers, the brand opened its 100th location, as its high-intensity, low-impact, strength workout—on a Pilates-inspired reformer—gained followers. The company plans to expand internationally in a move to more than double its footprint.

“[solidcore] has had a remarkable recovery from the pandemic,” Myers says. “The next three to five years will be a transformational chapter toward a milestone of 250 locations and initiating plans for opening our first international location. The goal is to meet consumers where they are.”

To support its continued growth and expansion into new cities, [solidcore] has secured new strategic funding from private equity firm Kohlberg & Company.

Orangetheory Fitness also continued to expand with 1,500 locations in 24 countries and plans to add 100 more locations this year.



New York Stock Exchange after its share price dropped to below \$1 and the company failed to file its financial reports on time.

As many, if not all, brick-and-mortar fitness facilities make strides, home fitness equipment makers, especially those offering higher-end products, have suffered huge losses. The two most high-profile companies, Peloton and Mirror—acquired by Lululemon Athletica Inc. for \$500 million in 2020—have slashed their prices and revised their financial projections.

Overall, franchising continues to be another bright spot for the global fitness industry as the franchise model showed great relative resilience during the pandemic.

Strong Numbers for Franchising

Overall, franchising continues to be another bright spot for the global fitness industry as the franchise model showed great relative resilience during the pandemic. Overall, club revenues fell by about 30%, and 22% of facilities closed during COVID, but franchise revenues dropped by about 13% with approximately 10% of franchised facilities shuttering during the crisis.

Along with SEB, Crunch Fitness remained one of the leaders in the sector. In 2020, during the height of the pandemic, Crunch Fitness thrived. Its membership grew by 5.6%, attrition stood at 2%, and the franchisor opened 40 new locations.

Jim Rowley, CEO and partner at Crunch, attributes that resilience to the company’s ability to leverage its many holdings.

“Because challenges weren’t absorbed by one corporately owned company, but instead, were distributed across many different owners who worked to mitigate these risks locally and share the risk, those challenges became less difficult to overcome, in the aggregate,” he says.

The same was true for SEB, which continues to show strong growth, global footprint expansion, and franchisee performance in third quarter 2023.

“We leaned on our 2,000 owners, who represent 5,500 clubs in 40 countries,” says Stacy Anderson, president, Anytime Fitness, Stronger U Nutrition, and Healthy Contributions. “We were able to learn from this massive network, gaining foresight from the early shutdown experiences in one country and applying lessons to the rest of our clubs.”

“Our business in the U.S. and internationally has grown, we’ve experienced consistently steady membership growth since May 2020, and our global member count has increased by 56% since late 2021,” reports Dave Long, CEO and co-founder of Orangetheory. “The numbers continue to rise daily, indicating that consumers returning to in-person fitness are here to stay.”

But not all of the news in the studio segment is positive.

SoulCycle has pulled out of the Canadian market completely. In total, it has closed 20 of its 83 studios—six in the New York City area, five in California, and others in Washington, D.C., Massachusetts, Illinois, Florida, and Georgia. However, the brand still has a presence elsewhere in the U.S. and in the UK.

In addition, another studio concept, F45, which offers a high-intensity workout, is struggling to find its financial footing. In August 2023, the company voluntarily delisted from the

Worldwide, the Industry Progresses

A number of countries have enjoyed a similar trajectory to varying degrees. Reports from national federations, consultants, and other experts in this report offer a vivid snapshot of the current fitness industry landscape around the world.

Although European businesses have been seeing progress, the continent has also been facing challenges, many of them caused by the continuing war in Ukraine. The tragic effects of the conflict are being felt on many levels with Ukrainian fitness businesses serving as community hubs during the turmoil, doing whatever they can to help.

A major effect of the war has been a disruption in the energy market, which was already facing stresses from inflation and other factors. Winter of 2022-2023 saw record spikes in energy costs across the continent with some government aid to help businesses of all kinds recover from the increased costs.

Still, optimism abounds, spurred by the return to normalcy for Europe's schedule of fitness events, most notably FIBO. Held April 13-16 in Cologne, Germany, FIBO 2023 featured 867 exhibitors and drew more than 100,000 visitors—an impressive showing just a year after its more understated return in 2022 that occurred after a two-year hiatus. The IHRSA European Congress is also returning after a three-year hiatus. It's scheduled for October 17-19 in Lisbon, Portugal.

What's more, the numbers for European clubs reveal a positive trend. According to the *European Health and Fitness Market Report 2023* by EuropeActive and Deloitte, the market continues to improve.

"Entering 2023, the European health and fitness market is back on its growth track," says Karsten Hollasch, a partner in financial advisory for Deloitte. "Looking ahead, a positive market development is expected also for this year, further supported by ambitious expansion plans of Europe's largest operators."

Here are some highlights from the report:

- Health club memberships increased in Europe by almost 7 million (+12.3%) for a total of 63.1 million people in 2022.
- There are 63,830 clubs in the region.
- Revenue for European facilities increased by 66% or €28 billion in 2022.
- The region experienced 13 mergers and acquisition deals during the year.

The biggest gains in membership numbers were enjoyed by Basic-Fit (3.4 million), RSG Group (1.81 million), and PureGym (1.66 million). Overall, Europe's top 20 operators account for 14.8 million members.

Other reports support the importance of exercise to the national GDP and public health. Research from the United Kingdom revealed the economic value of its fitness facilities. According to a report by Sport England and its Moving Communities initiative, UK leisure and fitness centers contributed nearly £1 billion in social value over the last year. This is an increase over the previous year in which they reported £778 million in economic benefits, according to data from 771 sites in the UK. Moving Communities is a platform from Sport England that's driven by 4GLOBAL and other partners.



Local Federations and Their Efforts

In his article on page 50, Guille Velez, editor of *Mercado Fitness*, explains the challenges faced by the fitness industry in Latin America.

"Consumer awareness of the need for physical activity has increased, but economic conditions and growing competition may test operators in the region," he writes.

Gustavo Almeida, CEO of Fitness Brasil, writes in his article on page 40 that interest rates and other economic concerns are affecting growth. As a result, the industry in Brazil is taking action.

"ACAD, the Brazilian Club Association, is playing a fundamental role with our public officials," writes Almeida. "Every stakeholder needs to roll up their sleeves to create what might be a game-changer for our entire industry. The dream is to have a 0% value-added tax (VAT) for clubs, similar to that in countries such as Norway."

Jorge Rosales of Management Around Sports (MAS) writes on page 52 about Mexico, noting that inflationary fears are an obstacle to growth, but Mexicans recognize the value of physical activity.

"Awareness of the importance of exercise is increasing," he writes. "A 2023 online survey by YouGov Global Profiles found that 71.2% of the population aspires to be healthy and fit."

The Asia-Pacific region was the hardest hit by the pandemic with China at the center of the storm. A \$7.1 billion market, according to IBIS World figures, the Chinese fitness industry suffered serious losses over the last three years.

In its article on page 42, CHINAFIT writes, "Looking toward 2024, competition will intensify, but the outlook is positive."

CHINAFIT has also worked diligently to help promote physical activity in the country by supporting different government initiatives.

Meanwhile, in Japan, the market there expects "to maintain growth in the 1% range in FY2023 and beyond, led by domestic demand," according to the article on page 48.

In his article about Australia on page 38, Barrie Elvish, CEO of AUSactive, writes that despite economic uncertainty, "COVID has significantly increased community awareness of the importance of exercise and physical activity," leading to an increase in gym memberships.

AUSactive has also taken the lead in promoting exercise as an essential part of preventative health by working with government agencies to create incentives for increasing physical activity.

The Bird's-eye View: Factors Shaping the Global Industry

Beyond the numbers, major trends—both challenges and opportunities—continue to have a tremendous effect on the market and its outlook, club management, and consumer behavior throughout the world.

For the market and club management, we see:

- **Consolidation.** Both in the supplier and the club space, acquisitions and mergers are changing the industry landscape. As Juan Del Rio Nieto, CEO of VivaGym Group, pointed out, consolidation of the industry could be a positive by increasing the influence of larger brands in promoting exercise and by enhancing professionalization and management.
- **Diversity, Equity, and Inclusion (DEI).** The industry is encouraging the development of DEI programs in fitness businesses. Efforts to increase inclusivity among club and studio memberships are also a priority for many operators.
- **Staffing.** Post-pandemic employment issues are affecting the industry as “quiet quitting” and higher employee turnover have increased in most sectors.
- **Artificial intelligence.** AI has emerged as a major issue in multiple sectors, including the fitness industry. As it stands now, AI has a role to play in CRM systems and other consumer-facing services.

Beyond the numbers, major trends—both challenges and opportunities—continue to have a tremendous effect on the market and its outlook, club management, and consumer behavior throughout the world.

It could become a helpful tool in sales and marketing. AI is finding its way to other parts of all media and communications, so its role should expand, yet its long-term implications still aren't clear.

- **Energy and insurance costs.** With volatile weather patterns becoming the norm, businesses are being hit with higher energy bills and more costly insurance coverage. The upcoming winter will answer a lot of questions about the ongoing severity of the problem. Club operators are advised to be prepared for any eventuality.

- **Supply chain issues.** Suppliers continued to face challenges with supply chain logistics, resulting in delays and increasing costs that then trickle down to club operators at every level.

■ **Integration with healthcare providers.** Some facilities are integrating with healthcare providers. A few brands, such as BodyTech, based in Colombia, have operated with a medical fitness model for decades. Other clubs are now finding the best fit for them when integrating healthcare into their value proposition. For example, The Atlantic Club in New Jersey met the Medical Fitness Association's stringent requirements to become a Certified Medical Fitness Facility. This trend should accelerate in the future.

- **New weight-loss drugs.** A new class of powerful drugs, such as Ozempic and Wegovy, have exploded in popularity. Designed to treat those with type 2 diabetes and obesity, some see these medications as a threat to the fitness industry. So far, these fears have been unfounded, but with similar treatments coming to market, the industry's ongoing messaging that pivots away from talking about exercising for weight loss to its more sustained benefits should continue.

With consumer behavior, we see:

- **Younger people and their preferences.** Industry forecasters continue to monitor the habits of various age groups, and so far, the data suggests that younger people, especially Gen Z and Gen Alpha, place a high priority on mental wellness, sustainability, inclusivity, and social wellness. Gen Z is an especially promising demographic, as more than one third (36%) say that they exercise regularly and 50% say they'd like to begin an exercise program.
- **The popularity of pickleball.** Called the fastest-growing sport in the world, pickleball continues to become a major attraction for consumers with 36.5 million people playing pickleball at least once in the last year. Many facilities have invested in converting underutilized space into courts, as the momentum of the popular activity doesn't seem to be slowing.
- **A surge in strength training.** Operators worldwide reported a jump in participation in resistance training programs among all demographics. This has led to many clubs prioritizing space and training instruction to strength training.
- **Interest in recovery amenities.** Ancillary services that offer sauna, massage, cryotherapy, and related modalities continued their rise in popularity. This tracks with the global trend in the growing interest in wellness services.

Industry consultant Rick Caro writes about the U.S. market in his analysis on page 59, but his words can apply to many other markets: “In 2024, we can expect to see a more understandable and predictive set of behavior patterns (e.g., new joins, cancels, usage, spending levels, etc.) and overall industry growth. The financial industry is optimistic about the future of the U.S. club and studio industry.”



IHRSA Enhances Its Advocacy in the U.S.

As IHRSA President & CEO Liz Clark celebrates her second-year anniversary as the association's leader, her successful track record includes a growth in IHRSA membership and a stabilization of its financial outlook. Although IHRSA's recovery from the pandemic is not yet complete, its fortunes have improved considerably during the last year under Clark and IHRSA Board of Director Chair Chris Craytor. This revival is best exemplified by the success of IHRSA 2023 in San Diego March 20-22, which drew attendance and exhibitor numbers that were close to pre-pandemic levels.

IHRSA's improved fiscal status now allows it to direct more of its resources to advocacy work in the U.S. that has produced results on both the federal and local level, and to help support advocacy groups internationally.

Some of the results from IHRSA's efforts this past year include:

- **Major legislation.** On March 14, 2023, the PHIT (Personal Health Investment Today) Act was reintroduced in Congress. If passed, the law will allow both Health Savings Account (HSA) and Flexible Spending Account (FSA) funds to be used for health club memberships, youth sports, and other expenditures related to physical activity. It has received strong backing from key lawmakers of both parties in the Senate and House of Representatives.
- **Collaboration.** IHRSA has enhanced its grassroots capabilities, working with both the National Health & Fitness Alliance (NHFA) and Global Health & Fitness Alliance (GHFA) to reach out to their members to keep them informed of regulatory and legislative issues affecting them, while also providing the tools to do so. Two major initiatives are Team 435, an NHFA grassroots effort to unite the fitness industry with one voice across the 435 congressional districts, and Senate Leadership 50, which does the same for the 50 states represented in the Senate. Both groups continue to play a role in helping to pass PHIT, promote policy that benefits the industry, and oppose measures that could negatively impact the industry.
- **One-on-one contact.** IHRSA has increased its face-to-face lobbying of influential legislators in Washington, D.C., most notably

during the second annual IHRSA Fly-In & Advocacy Summit on May 9-10. IHRSA leaders and members met with numerous lawmakers and other officials to gain their support for the PHIT Act and other measures to help promote physical activity.

- **Ongoing organizing.** IHRSA has launched a Strategic Advisory Committee (SAC), consisting of more than 20 of the global fitness industry's top professionals. The SAC first met at IHRSA 2023 in March 2023 and reconvened in July 2023. The group continues to work on developing strategic operational plans, upcoming research reports, and other projects.

- **Government studies.** IHRSA's advocacy team is now working to have the Department of Labor, the Census Bureau, and the Bureau of Economic Analysis do a full economic impact study on a two-year basis of the adult sports fitness industry.

- **State monitoring.** IHRSA continues to watch for activities in individual states in the U.S. with productive results. IHRSA Vice President of Government Affairs Mike Goscinski, joined by Maryland club operators and other business leaders, stopped Maryland legislation that would have eliminated liability waivers for gyms and health clubs.

- **Regulatory vigilance.** IHRSA also is tracking changes proposed by the Federal Trade Commission (FTC) that would require simple cancellation methods, otherwise known as "click-to-cancel," which would negatively affect the industry. Some states are also proposing similar measures. IHRSA will continue to fight these and other moves that would cause harm to fitness businesses.

Going forward, IHRSA's three pillars—advocacy, education, and research—will continue to guide the associations' agenda. This includes a focus on:

- **Military readiness.** IHRSA's Fly-In & Advocacy Summit hosted a session on "Inactivity's Impact on U.S. Military Readiness." Military leaders stressed the importance of physical activity for national defense and the need for greater access to fitness facilities for recruits and members of the Armed Forces who live among the civilian population. This interest is shared by countries around the world.

- **Youth fitness.** Preparing young people for a life of healthy habits will be an important benefit of the PHIT Act, which aims to increase funds available for youth sports programs. This is another important mission for IHRSA members in many countries that face increased childhood obesity rates and sedentary behavior among youth.

- **Mental health and wellness.** Research continues to support the role of exercise in reducing mental health disorders while enhancing mood and well-being. Supporting the case is an important new study, "Effectiveness of physical activity interventions for improving depression, anxiety and distress: an overview of systematic review," recently published in the *British Journal of Sports Medicine*. The lead author of the study, Dr. Benjamin Singh, concludes, "I believe that physicians should recommend exercise to their patients with mental health disorders as a first-line treatment."

This study and other ongoing research continue to support an important goal: the further realization that a healthy, active lifestyle is essential in preventive health and to the integration of the global fitness industry into the healthcare continuum.

This effort received a significant boost on July 20, 2023. The Office of the National Coordinator (ONC) for Health Information Technology—part of the U.S. Department of Health and Human Services—added physical activity as a key healthcare metric to its data system. The Physical Activity Data Element will become part of the United States Core Data for Interoperability (USCDI). The ONC, a resource for the entire U.S. healthcare system, supports the adoption of health information technology and the promotion of a nationwide, standards-based information exchange to improve healthcare.

Healthcare professionals rely upon this data system, which means that physical activity levels and related data will now be an integral part of overall patient assessments and treatments. The Physical Activity Alliance (PAA), a broad-based voice for physical activity promotion in the U.S., describes this move as a “major milestone.”

To the PAA and its allies, including IHRSA and most major fitness and wellness organizations, it’s nothing less than a game-changer for the U.S.—and perhaps for the entire global fitness industry. The PAA sees it as a “critical step towards making physical activity assessment, prescription, and referral standard practice in the American healthcare system.”

IHRSA’s International Advocacy: The World Takes Notice

Major global health organizations and experts, including the World Health Organization (WHO), continue to stress the importance of physical activity for health, wellness, and the prevention of disease. As a result, non-government organizations (NGOs) and other groups have emerged as strong allies of the global fitness industry in promoting exercise.

The WHO sent a letter acknowledging the importance of the IHRSA Foundation and the GHFA for their contributions in advancing their mission of increasing physical activity worldwide. Dr. Naoko Yamamoto, assistant director-general, division of UHC/Healthier Population at the WHO, penned the letter, which cited the support IHRSA and the GHFA have provided to initiatives from the WHO Physical Activity Unit.

Further bolstering the positioning of the fitness industry as part of the healthcare continuum was the positive messaging in the Deloitte report, *Economic Health & Societal Well-being: Quantifying the Impact of the Global Health & Fitness Sector*. Commissioned by IHRSA and the GHFA last year, Deloitte’s research demonstrates the efficacy of regular physical activity in increasing GDP while reducing healthcare costs—in nearly every country in the world.

Similar results have been found in other reports, including one by KEN Research, which studied the fitness industry in the Middle East/North Africa (MENA) region. Also commissioned by IHRSA and the GHFA, this report indicates healthcare savings and contributions to GDP across the region. The Deloitte and



The WHO sent a letter acknowledging the importance of the IHRSA Foundation and the GHFA for their contributions in advancing their mission of increasing physical activity worldwide.

Ken Research reports cover 55 countries amounting to 90% of global GDP, including all of the key fitness industry markets.

Another groundbreaking report by Deloitte was commissioned by the Fitness Industry Council of Canada (FIC). *The Impact of Our Sector: A Health Valuation of Sport and Physical Activity in Canada* reports that the Canadian fitness industry helped to generate health savings of CA\$23.4 billion in 2019 and prevented more than 2.2 million cases of health conditions. In addition, health and fitness facilities alone generated CA\$6.19 billion in total social value.

The FIC, which represents more than 6,000 fitness facilities with more than six million members, is also an effective advocate for Canadian clubs. On August 19, the FIC and other fitness professionals in the province of Saskatchewan successfully defeated a proposed 6% tax on gyms in the province.

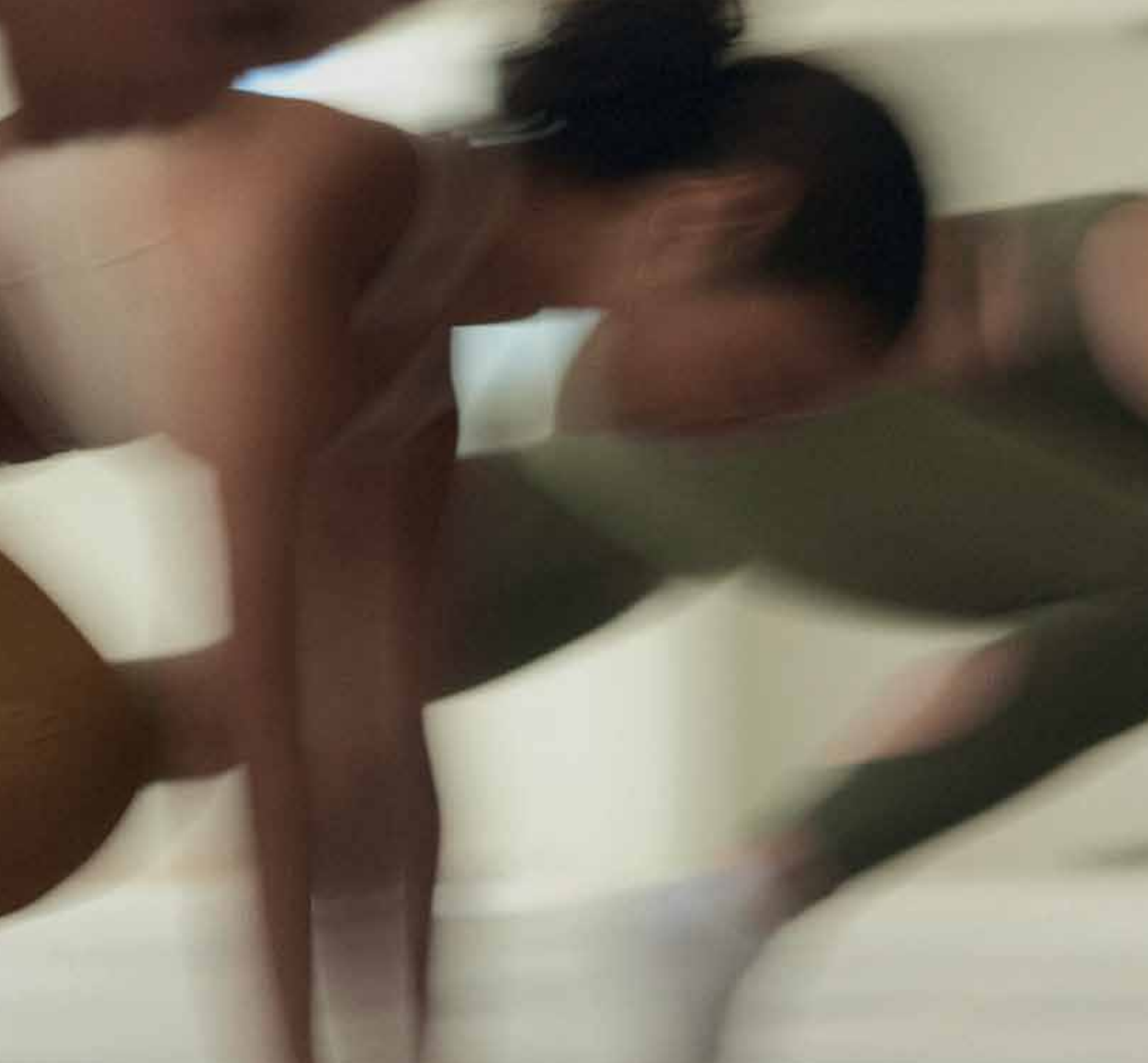
As Sara Hodson, president of the FIC and CEO of LiveWell Exercise Clinic, summed up, “The fitness industry has evolved in the last few years, and our role isn’t simply about physical and mental health. We are essential for social health.”



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IN MEMORIAM: **Augie Nieto and Rainer Schaller**

In the last 12 months, two remarkable global icons passed away. Both helped to shape the global industry during their lifetimes.



Augie Nieto died peacefully on February 22, 2023, surrounded by his family. He is survived by wife, Lynne, their four children, and eight grandchildren. Nieto was admired as a fitness industry pioneer and innovator. He was deeply respected for staring down a devastating and debilitating disease. In both spheres, he inspired millions.

In the 1970s, as a 19-year-old entrepreneur, Nieto brought a revolutionary product to the marketplace. The Lifecycle changed the way people exercise for good.

"Augie created the electronic cardiovascular equipment category and headed up the largest fitness equipment company in the world—Life Fitness," says Rick Caro, president of Management Vision, an industry consultancy in New York.

In 2005, he was diagnosed with amyotrophic lateral sclerosis, or ALS—a disease of the nerve cells in the brain and spinal cord that controls voluntary muscle movement. After that, Nieto dedicated his life to raising funds for ALS research through the nonprofit Augie's Quest to Cure ALS. Most people live two to five years with ALS, but he fought it for 18 years.

"I truly thought that Augie's passing would never come," Caro adds.

John McCarthy, executive director emeritus of IHRSA, says, "As a friend and a super smart business colleague, I will always hold Augie in the highest regard and highest esteem. He was a man who became even greater in his years with ALS than in his magnificent years as the CEO of Life Fitness."



Rainer Schaller, founder of RSG Group, died on October 21, 2022. Schaller, his life partner Christiane Schikorsky, their two children, an RSG Group employee, and a pilot were on a nine-seat jet that crashed into the Caribbean Sea on a flight from Mexico to Costa Rica.

Born in 1969 in Germany, Schaller opened his first gym in 1997. Today, RSG Group owns 21 fitness, lifestyle, and fashion brands that include Gold's Gym, McFit, John Reed, Heimat, Holmes Place Spain, High5, and others.

"Rainer was more than just the founder and guiding light of our company," says an RSG statement released after his death. "He was someone who inspired people to reach for the stars, who encouraged others to believe in themselves and their own potential, and was firmly convinced that there are no limits to those who pursue common goals with united forces."

"As a visionary, he pushed ideas forward and made them a reality. With his boundless passion for innovation, he has achieved the impossible, which no one else believed in at first. As founder, owner, and CEO, he created and lived a corporate culture where trust is sown and true friendship is reaped alongside success. As a friend and mentor, he was there for others unconditionally. At eye level, approachable and open, he listened to others and provided reassurance—especially when they needed it most. As a person, Rainer loved life."

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A POSITIVE OUTLOOK:

An Analysis of Consumer Insights, Economic Research, and the *IHRSA Global Report* Survey Results

By Melissa Rodriguez, Market Research Advisor to IHRSA

IHRSA's annual survey of some of its largest member health clubs and studios yielded data that demonstrates that consumer trends, despite economic challenges, signal better years ahead.

As health clubs and studios in the global marketplace worked to recover from the pandemic, another wave of obstacles emerged: economic volatility and geopolitical conflict. Despite a spate of new and ongoing challenges, leading fitness companies posted solid performance and results in 2022 and the first half of 2023..



Rodriguez

Following are four takeaways derived from consumer insights, economic research, and data gathered from club operators through the annual *IHRSA Global Report* survey.

1. While facing a volatile macro environment, the top health club companies recorded strong year-over-year growth in 2022.

The lingering effects of the pandemic and economic volatility continued to challenge businesses in 2022. Operators contended with historic inflation, supply chain issues, staffing challenges, higher energy costs, increasing interest rates, and recession fears.

The International Monetary Fund (IMF) adjusted global gross domestic product (GDP) growth down to its weakest forecast in more than 20 years. The IMF anticipates sluggish GDP growth for advanced economies in North America, Europe, and Asia through 2024.

Despite these headwinds, leading fitness club companies recorded strong performances in 2022. Topping global rankings in memberships, Planet Fitness, based in the United States, reached an all-time high of 17 million members at the end of 2022, up 12% from 15.2 million in 2021. In Latin America, Brazil-based Smart Fit grew its member count by 26%, finishing 2022 with approximately 3.8 million members.

After facing closures and restrictions in 2021, operators in Europe significantly grew memberships in 2022:

- Headquartered in the Netherlands, Basic-Fit improved by 51%, ending the year with 3.3 million members.
- Fitness Park Group rose by 33%, as this operator, based in France, attracted 835,000 members at year-end.
- Keep Cool, another French brand, boosted membership by 43%, ending the year with more

Select Operators (The Americas): Company Headquarters & Description

COMPANY	HQ	DESCRIPTION
24 Hour Fitness	U.S.	Full-service, privately-owned chain with fitness-only clubs in the U.S..
Anytime Fitness	U.S.	Affordable, convenient 24-hour clubs with locations in every continent.
Bluefit Academias	Brazil	Franchise brand with affordable, HVLP 2.0-like clubs based in Brazil.
Burn Boot Camp	U.S.	Bootcamp boutique franchise with locations in the U.S.
Crunch Holdings, LLC	U.S.	Mainly franchised operator of HVLP 2.0 gyms, along with group fitness offerings.
Gold's Gym International	U.S.	Legacy gym brand with mainly franchised locations; part of RSG Group.
GoodLife Fitness Group	Canada	Largest privately owned fitness club operator in Canada with low-price and affordable/mid-market clubs: Fit4Less, EconoFitness, and Goodlife Fitness.
Hotworx	U.S.	24-hour infrared fitness studio offering virtual workouts across multiple disciplines.
Life Time	U.S.	Public firm operating resort-like fitness clubs with programming for every age group and families.
LIFT Brands	U.S.	Parent company of Snap Fitness with ownership stakes in 9Round and FITSTOP.
Planet Fitness	U.S.	Pioneer of high-volume, low-price (HVLP) centers.
Powerhouse Gyms International	U.S.	Historic gym brand with locations across multiple regions.
Smart Fit	Brazil	Largest club operator in Latin America; publicly traded, offering HVLP fitness centers.
Xponential Fitness	U.S.	Publicly traded parent company of 10 boutique brands: Club Pilates, Pure Barre, CycleBar, StretchLab, Row House, AKT, YogaSix, STRIDE Fitness, Rumble, and BFT.

than 400,000 members after it acquired roughly 30 clubs in France in 2022.

U.S.-based Xponential Fitness (+31%) and German club FitX (+18%) round out the top five in membership growth. The Gym Group in the UK (+14%), Renaissance in Japan (+12%), and Viva Leisure Group in Australia (+12%) all posted double-digit membership growth.

Leading fitness operators also added new locations. Based in the U.S., Anytime Fitness, the global leader in number of locations, finished 2022 with more than 5,000 locations worldwide. Two Anytime Fitness master franchisees account for a noteworthy share of those clubs:

- Fast Fitness Japan, a publicly traded company, has approximately 1,000 locations and 700,000 members.
- Collective Wellness Group has more than 500 locations with more than 600,000 members in Australia.

Xponential Fitness continued its expansion of boutique brands in 2022, ending the year with more than 2,600 locations, an improvement of 24%. Three other companies also added a large number of new sites in 2022: Planet Fitness (+7%), Smart Fit (+15%), and Basic-Fit (+18%).

In China, the rise of a new model, the smart gym, has accelerated since COVID. HiLeFit, in particular, stands out. Since 2019, the company has grown from roughly 450 locations to more than 1,200 stores in China. Membership count tops 10 million, ranking HiLeFit second to Planet Fitness.



Select Operators (Asia-Pacific): Company Headquarters & Description

COMPANY	HQ	DESCRIPTION
Collective Wellness Group	Australia	Ownership group of franchised Anytime Fitness locations in Australia and XTEND boutique studios.
Curves Holdings Co., Ltd.	Japan	Public firm/master franchisee of women-only fitness studio brand in Japan.
Fitness & Lifestyle Group	Australia	Operator of multiple brands in APAC, including Goodlife Health Clubs, Fitness First Australia, Jetts (NZ & Thailand), Barry's, and California Fitness & Yoga.
HiLeFit	China	New model/smart gym operator of mainly franchised clubs in China.
Lava Hot Yoga Studio	Japan	Hot yoga studio operator with locations in Japan and Singapore.
Renaissance Incorporated	Japan	Publicly traded fitness and sports club company with locations in Japan.
Viva Leisure Group	Australia	Publicly traded company with multiple club brands, including Club Lime, Plus Fitness, HIIT Republic, GroundUp Studios, and Rebalance Pilates & Yoga.

Performance results from leading fitness clubs support the stickiness of fitness habits adopted during COVID and post-pandemic. Even in an uncertain economy, consumers are prioritizing fitness and wellness:

- A Mindbody survey shows that 64% of Americans believe that wellness is more important than other leisure activities. Virtually all (87%) of respondents maintained or increased wellness spending in 2022.

- In Europe, exercise enthusiasts are now prioritizing fitness club activities despite an inflationary environment, according to research by Deloitte and EuropeActive conducted in early 2023.

And now, consumers have more options than ever. This is evident by the variety of fitness concepts offered by leading companies. Consumers can choose from low-priced gyms, studios, 24-hour facilities, luxury brands, or traditional health clubs.

Although 2022 was a strong year for industry leaders, the year wasn't a success for all health club businesses. Market data attests to the challenges operators struggled with and continue to face.

2. Fallout from the pandemic, economic headwinds, and operational struggles continue to challenge the fitness club industry.

Historically, the fitness industry has shown resilience in economic downturns. However, market data suggests the recent economy posed overwhelming challenges for operators still struggling with pandemic fallout. This was particularly the case for markets in advanced economies where the IMF predicted a slowdown. A full recovery has not been reached in health club markets in the United Kingdom, Germany, Spain, and Japan.

Emerging fitness markets are also contending with economic and regulatory headwinds. In Chile, high inflation coupled with an increased value-added tax (VAT) rate may stall long-term industry growth. A potential VAT rate increase in Romania also threatens the future of the industry there. High inflation and tax rates stand to adversely impact both club operators and fitness consumers.

The year also saw a stall in membership recovery for public companies. Even with a bounce back in



Select Operators (EMEA): Company Headquarters & Description

COMPANY	HQ	DESCRIPTION
Basic-Fit	Netherlands	Publicly traded HVLP chain with locations in Europe.
Bodystreet	Germany	Pioneer of EMS training studio with locations in Europe, Tanzania, and U.S.
David Lloyd Leisure (DLL)	UK	Premium club chain with locations throughout Europe.
EASYFITNESS	Germany	European multi-franchise operator of premium, low-price, and studio brands.
Fitness Park Group	France	Largest privately owned fitness chain operator in France with discount, low-price, and mid-market clubs.
FitX	Germany	24-hour gym chain offering in-person classes and virtual workouts with locations in Germany.
Forus	Spain	Concession model as a multi-site operator with units concentrated in Spain, Portugal, and Italy.
Friskis & Svettis	Sweden	Non-profit organization operating fitness clubs in Europe.
Keep Cool	France	Mainly franchised operator of affordably priced, mid-sized gyms offering coaching/small group training.
L'orange bleue	France	French operator of club concepts focused on fitness training and wellness coaching.
Leejam/Fitness Time	Saudi Arabia	Public firm with locations in Saudi Arabia and the United Arab Emirates serving premium, low-priced, and women-only segments.
Mrs. Sporty	Germany	Women-only fitness club company, mainly franchised with locations in Europe.
Nuffield Health	UK	Healthcare charity based in the UK that operates wellness centers offering gym floor amenities, personal training, swimming lessons, and other services.
PureGym	UK	Operator of affordably priced health clubs in the UK, Denmark, Switzerland, Saudi Arabia, and the U.S.
RSG Group	Germany	Parent company of several fitness club brands, including Gold's Gym, McFit, John Reed and High5.
SATS Group	UK	Publicly traded company with multiple club brands, including SATS/Elixia, Fresh Fitness, and SATS Yoga.
The Gym Group	UK	Public firm with low-priced fitness centers in the UK.

2022, membership levels at Mexico-based Grupo Sports World and Curves Holding's Group, based in Japan, peaked at 95% of pre-pandemic benchmarks.

Other notable club operators also encountered challenges:

- A COVID surge in early 2022 forced Fitness First to permanently close its seven locations in Hong Kong.
- SoulCycle announced in 2022 that it would close 25% of its locations in the U.S.
- Facing the combination of halted expansion plans, financial struggles, legal battles, and a plummeting stock price, F45 voluntarily delisted from the New York Stock Exchange in August 2023.

The post-COVID macro environment is an especially daunting hardship for small to mid-sized enterprises (SMEs). Economies of scale and access to financing and other resources not only insulated many larger enterprises from the impact of COVID but also positioned them for growth as they emerged from the pandemic. This was not the case for SMEs.

Government support and the restructuring of leases during the pandemic helped some smaller firms, but economic relief and patience from landlords have dwindled since then. An analysis by the Organisation for Economic Co-operation and Development (OECD) of SMEs across more than 30 countries shows that geopolitical tension and economic adversity overwhelm smaller businesses more often than larger enterprises.

Some of the notable macro challenges impacting SMEs in the fitness industry are:

- **A tight labor market.** A restrictive job market is especially burdensome for small businesses who attempt to grow and retain staff, as they may not be able to compete with a compensation plan that larger enterprises can offer. Clubs participating in the IHRSA Global Report survey identified staffing recruitment/training as the number one challenge they face, consistent across scale of operation.
- **High inflation.** Rising costs challenge health club operators who already have thin profit margins. Passing on costs to consumers in a competitive fitness market creates the risk of losing members.
- **Fiscal policy characterized by fluctuating interest rates.** High interest rates make financing

Number of Members: 2022

RANK	COMPANY	TOTAL
1	Planet Fitness	17,000,000
2	HiLeFit	10,000,000
3	Anytime Fitness	3,900,000
4	Smart Fit	3,800,000
5	Basic-Fit	3,352,000
6	Crunch Holdings, LLC	2,160,000
7	24 Hour Fitness	2,140,000
8	RSG Group (Europe Only)	1,805,000
9	Powerhouse Gyms International	1,800,000
10	PureGym	1,665,000
11	Life Time	1,400,000
12	GoodLife Fitness Group	1,300,000
13	FitX	842,000
14	Fitness Park Group	835,000
15	The Gym Group	821,000
16	Curves Holdings Co., Ltd.*	787,000
17	David Lloyd Leisure (DLL)	730,000
18	SATS Group	721,000
19	Xponential Fitness	590,000
20	Friskis & Svettis	486,000
21	EASYFITNESS	435,000
22	Keep Cool	422,000
23	Renaissance Incorporated	373,615
24	Forus	372,000
25	Nuffield Health	366,000

**As of 30 November 2022. Does not include all Curves locations worldwide. Total number refers to members of units owned and franchised by the publicly traded operator Curves Holdings Co., Ltd.*

Rankings are based on club operator participation in the IHRSA Global Report survey, EuropeActive Health & Fitness Market Report (2023), and public, published sources. Membership rankings do not include leading operators Fitness International, F45 Training, LIFT Brands, Gold's Gym International (RSG North America), Evolution Wellness Group, and others who did not submit company profile information.

Member Growth: 2021–2022

RANK	COMPANY	2022 MEMBERS	2021 MEMBERS	% CHANGE
1	Basic-Fit	3,352,000	2,220,000	51%
2	Keep Cool	422,000	296,000	43%
3	Fitness Park Group	835,000	630,000	33%
4	Xponential Fitness	590,000	449,000	31%
5	Smart Fit	3,800,000	3,007,000	26%
6	FitX	842,000	716,000	18%
7	The Gym Group	821,000	718,000	14%
8	Renaissance Incorporated	373,615	332,901	12%
9	Viva Leisure Group	333,423	297,211	12%
10	Leejam/Fitness Time	327,000	292,000	12%

Select Publicly Traded Operators: Members (30 June 2022–30 June 2023)

COMPANY	30 JUNE 2022	31 DEC 2022	30 JUNE 2023	YTD % CHG	YOY % CHG
Planet Fitness (NYSE: PLNT)	16,500,000	17,000,000	18,400,000	+8%	+12%
Smart Fit (BVMF: SMFT3)	3,438,000	3,800,000	4,271,000	+12%	+24%
Basic Fit (AMS: BFIT)	2,920,000	3,352,000	3,610,000	+8%	+24%
The Gym Group (LON: GYM)	790,000	821,000	867,000	+6%	+10%
Xponential Fitness (NYSE: XPOF)	530,000+	590,000	697,000	+18%	+29%
Viva Leisure Group (ASX: VVA)	320,161	333,423	343,325	+3%	+7%



operations and capital expenditures costly. This is especially burdensome to fitness SMEs planning upgrades and expansion. In many cases, high interest rates have delayed plans for new openings.

The OECD report highlights the fact that growth in the establishment of new businesses has slowed since the start of 2022. Meanwhile, firm exits have increased. Consistent with OECD findings, many club operators are holding fast to their current level of existing stores. In this year's survey by IHRSA, half of the respondents indicated they will maintain the same number of units in 2023.

3. Club operator expectations and year-to-date filings from public firms signal a favorable 2023 for the fitness club industry.

Clearly, businesses continue to face an overwhelming macro environment. Still, the club operator outlook and public firm data are both positive indicators for the industry for the rest of 2023, though some caution is warranted.

At the time of publishing, inflation had been easing in many global markets, infusing optimism for a moderation in fiscal policy. Businesses that have survived are adapting to a new normal of economic uncertainty. Although banking pressures in early 2023 stoked fears of another Great Recession causing industry growth to stall and multi-site operators to close locations, a financial crisis was averted.

Club operators are optimistic. Four out of five (81%) of those surveyed by IHRSA expect membership to grow by more than 5% in 2023 relative to 2022. The same percentage anticipate that revenue will increase by more than 5%. Nearly two-thirds (65%) expect EBITDA to improve by more than 5%, although EBITDA still won't return to pre-pandemic levels for most.

The latest filings from public health club companies also indicated an upward swing. A January 2023 boost in memberships was sustained through early summer for low-priced operators, including Planet Fitness, Smart Fit, and Basic-Fit.

■ Planet Fitness ended June 2023 with 18.4 million members, up from 17 million at the end of 2022, an improvement of 8%.

■ Basic-Fit membership grew 8% year-to-date as the publicly traded firm finished June 2023 with 3.6 million members, up from roughly 3.4 million at year-end 2022.

Number of Total Units: 2022

RANK	COMPANY	TOTAL
1	Anytime Fitness	5,143
2	Xponential Fitness	2,641
3	Planet Fitness	2,410
4	Curves Holdings Co., Ltd.*	1,954
5	F45 Training**	1,900+
6	Orangetheory	1,528
7	Smart Fit	1,236
8	HiLeFit	1,200+
9	Basic-Fit	1,200
10	LIFT Brands	1,100+
11	RSG Group (Europe & North America)	900+
12	PureGym	555
13	9Round	543
14	Crunch Holdings, LLC	421
15	Lava Hot Yoga Studio	420+
16	Hotworx	409
17	Fitness & Lifestyle Group	385
18	L'orange Bleue	380
19	GoodLife Fitness Group	370
20	Viva Leisure Group	338
21	Bodystreet	309
22	Keep Cool	302
23	Burn Boot Camp	300+
24	Mrs. Sporty	300
25	24 Hour Fitness	283

*As of 30 November 2022. Does not include all Curves locations worldwide. Total count refers to units owned and franchised by the publicly traded operator Curves Holdings Co., Ltd.

**Based on data from Q2 2022 public filing.

Select Public Firms— Number of Members & Total Units: 2022

COMPANY	MEMBERS	UNITS
Planet Fitness	17,000,000	2,410
Smart Fit	3,800,000	1,236
Basic-Fit	3,352,000	1,200
Life Time	1,400,000	161
The Gym Group	821,000	230
Curves Holdings Co., Ltd.	787,000	1,954
SATS Group	721,000	275
Fast Fitness Japan	710,000	1,055
Xponential Fitness	590,000	2,641
Renaissance	373,615	173
Viva Leisure Group	333,423	162
Leejam/Fitness Time	327,000	156

Economies of scale and access to financing and other resources not only insulated many larger enterprises from the impact of COVID but also positioned them for growth as they emerged from the pandemic.

- The number of members at Smart Fit rose by 12% from a year-end 2022 tally of 3.8 million. At mid-year 2023, Smart Fit had nearly 4.3 million members.
- Public firms and ownership groups with multiple club brands show solid results so far this year.
- Viva Leisure Group reported annual revenue growth of 55% and total membership growth of 7.2% for its fiscal year ending June 30, 2023. Headquartered in Australia, the public firm has a portfolio of traditional health clubs, low-price fitness centers, and boutique studios.
- Based in Germany, the LifeFit ownership group recently published 2023 half-year results. The operator of multiple club models reported that its member base had recovered to pre-pandemic levels in April 2023. Revenue during the three months ending in June 2023 improved by 35% relative to the same period last year.
- Early calendar year results from the UK-based SATS Group exhibited growth. On a quarter-over-quarter basis, revenue grew by 19%, while

membership rose by 7% for the three months ending in March 2023. (Results through June 2023 had not been provided by the public firm at the time of publishing.)

- Filings from Xponential Fitness indicate growth for this parent company of 10 boutique brands. Xponential finished June 2023 with 697,000 members across 2,892 studios worldwide. Both metrics are improvements on year-over-year and year-to-date bases.

Reports from public fitness equipment firms also support an upward trend for in-person fitness. B2C revenue results from Technogym and Nautilus signal a normalization in home fitness trends. At the same time, B2B sales for Technogym grew by 20% during the first six months of 2023 versus the same period in 2022. Technogym sales in Latin America (+35%) and the Middle East, India, and Africa (+45%) outperformed all other regions.



Data from club operators and public companies are a testament to the demand for in-person fitness services. These drivers for growth are further reinforced by consumer and economic impact research.

4. Consumer and economic impact research support a favorable long-term outlook for the fitness industry.

Several findings point to the health and fitness industry's potential. The Global Wellness Institute forecasts the global market for physical activity to reach \$1.1 trillion by the end of 2023 with significant growth coming from emerging markets in Asia-Pacific, Middle East-North Africa (MENA), and Latin America-Caribbean. Even with the globalization of the club industry, markets in these regions present greenfield opportunities. The vast majority of club units owned by the top 25 companies are located in North America, Europe, and Australia.

Worldwide, physical health and well-being are front of mind for consumers. An IPSOS Global Tracker study found that across 50 territories worldwide, 86% of consumers are motivated to look after their physical health. This desire is highest among respondents from Asia, Africa, and Latin America. Fitness businesses can leverage the drive for physical well-being as the economies, infrastructures, and per capita income of emerging countries improve.

Elevated physical inactivity rates also uniquely position health club and studio operators to help address the financial burden sedentary lifestyles impose on the global economy and the healthcare system. Research by the World Health Organization (WHO) found that 500 million people will contract heart disease, diabetes, or other noncommunicable diseases—including depression and anxiety—due to physical inactivity. The report recommends collaborative policy making across governments,

Number of Total Units—Mainly* Franchised Brands: 2022

RANK	COMPANY	PARENT COMPANY	TOTAL**
1	Anytime Fitness	Self Esteem Brands	5,143
2	Planet Fitness	Planet Fitness	2,410
3	Curves (Japan)	Curves Holdings Co., Ltd.	1,954
4	F45 Training	F45 Training	1,900+^
5	Orangetheory Fitness	Orangetheory Fitness	1,528
6	HiLeFit	HiLeFit	1,200+
7	Snap Fitness	LIFT Brands	1,000+
8	Club Pilates	Xponential Fitness	826
9	PureBarre	Xponential Fitness	638
10	Gold's Gym	RSG Group	600+
11	9Round	9Round	543
12	Crunch Holdings, LLC	Crunch Holdings, LLC	421
13	Hotworx	Hotworx	409
14	Bodystreet	Bodystreet	309
15	StretchLab	Xponential Fitness	305
16	Burn Boot Camp	Kline Franchising	300+
17	Mrs. Sporty	Mrs. Sporty	300
18	Cycle Bar	Xponential Fitness	282
19	BFT	Xponential Fitness	230
20	Plus Fitness	Viva Leisure Group	200
21	Workout Anytime	Workout Anytime	190+
22	Fitness Park	Fitness Park Group	188
23	Yoga Six	Xponential Fitness	170
24	Kieser	Kieser	148
25	Bluefit Academia	Bluefit Academia	130+

*Brands in which at least 70% of total units are franchised locations.

**Total units include both franchised and corporate-owned stores.

^Based on data from Q2 2022 public filing.

healthcare institutions, and businesses such as fitness clubs and studios to reduce the toll of physical inactivity.

Health clubs play a vital role in improving the well-being of the global society as a whole. The fitness industry contributes to a number of the United Nations' Sustainable Development Goals (SDGs).

- Fitness businesses directly contribute to the UN's Sustainable Development Goal (SDG) of good health and well-being.

- Club operators that offer personal training, group classes, nutrition coaching, and/or community health workshops also support the SDG goal of quality education.

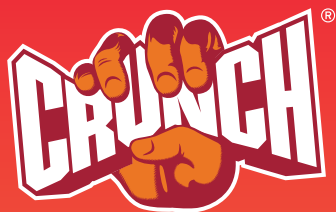
- The health and fitness industry is also a major contributor to GDP and jobs across the globe, adding to the SDG goal of work and economic growth.

Deloitte's 2022 *Economic Health & Social Well-being Report* shows that the global health and fitness industry directly contributes upwards of \$100 billion to the world economy and supports millions of jobs.

Data from club operators and public companies are a testament to the demand for in-person fitness services.

Looking ahead, several factors point to an encouraging outlook for the health club industry. Health and fitness awareness continues to increase post-COVID. Data from leading clubs suggest a promising 2023, while consumer and economic research findings signal opportunities for industry expansion and policymaking. Health club and studio businesses that have survived the pandemic and the macro environment should benefit from strong tailwinds supporting their long-term growth.





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THE DATA POINTS TO A FUTURE FULL OF OPPORTUNITY FOR FITNESS FACILITIES

By Cristine Kao, Chief Marketing Officer, ABC Fitness

HRSA asked Cristine Kao, chief marketing officer at ABC Fitness, to analyze some of the data the company has collected during the past year for the North American fitness market and share what it tells us about the health of the fitness industry.



Q: What is the scope of ABC's clientele—the countries in which you have clients and the types of facilities you serve?

A: Our latest report focuses on the United States and Canada only, and our primary customer demographic is traditional gyms and health clubs.

Q: What membership trends does your data show from the first half of 2023 compared with the first half of 2022?

A: Membership numbers improved for all age groups, particularly the youngest and oldest members. It breaks down as follows:

- **Under 25:** Men are up 17%, and women are up 10% in new joins
- **26–35:** Men and women are both up 8% in new joins
- **36–45:** Men are up 9%, and women are up 10% in new joins
- **46–55:** Men are up 5%, and women are up 7%
- **56+:** Men are up 15%, and women are up 18%

Q: How are cancellations trending, and to what do you attribute this trend?

A: Cancellations as a percent of new joins have stabilized back to pre-COVID levels in 2019, which we believe indicates a return to typical consumer behavior and normal rates of attrition.

Q: What trends are you seeing in check-ins, and to what do you attribute those trends?

A: Check-ins are up 27% year-over-year. They're up 41% compared to 2021. This is an incredibly heartening sign that fitness consumers have come back to the gym and are steadily increasing utilization.

Q: What do these numbers tell you about club and studio recovery, and prospects for the second half of this year and for 2024?

A: The data points to an exciting future full of opportunity. Numbers across the board within our portfolio point to a strong recovery that exceeds pre-COVID levels with higher member engagement.

Q: Based on your analysis of this data, how well has the industry rebounded from the pandemic?

A: We fully believe that a rising tide raises all ships, and the recovery of our customers is a positive indicator for our entire industry, and for the health of consumers globally. Although the rates of recovery have varied by region, the level of member engagement we are seeing indicates the changing value of fitness to consumers. We believe that operators who can lean into wellness can take advantage of this shifting sentiment.

Q: Please share what this data for North America might mean for the rest of the world.

A: As we pull together our global data, we expect that these trends will be complementary to those findings. However, we also need to look beyond the age and gender of the membership and understand the different personas that are consuming fitness differently. For example, within the Gen Z demographics group, there are three distinct cohorts that are willing to spend and utilize the gym differently. As club operators plan for growth, it's important to work with a technology partner that can help you anticipate these trends and bring forth these critical insights.



STUDIOS ARE EXPERIENCING THE RISE OF MULTISITE EXPANSION AND INTERNATIONAL GROWTH

By Jarron Aizen, Founder and CEO, Hapana

During the past 12 months, the data collected by many of our studio clients, who range from three sites to more than 150, have given us insights into the resilience of studios and what the future of this industry sector could be.

Recovery in the Boutique Space

The data shows that boutique studios experienced a remarkable surge in growth with an average increase in gross revenue of approximately 175% from March 2020 to March 2021. However, growth moderated in subsequent years, stabilizing at around 15.7% from March 2021 to March 2022 and 16.3% from March 2022 to March 2023.

Hapana's latest analysis shows that a promising 68.95% of serviced businesses witnessed higher revenue in July 2023 compared to the previous year, showcasing resilience amidst economic challenges.



Australian and North American businesses faced significant revenue fluctuations due to varying pandemic impacts, government responses, and consumer behavior. In contrast, Singapore and New Zealand demonstrated more stable and consistent growth patterns.

An analysis of the fitness brands serviced by Hapana reveals another significant trend that has unfolded over the past few years. Since March 2020, our data indicates that about 13.5% of fitness locations have discontinued operations, with “closure” being the predominant reason.

This trend, which began to emerge after March 2020, represents a substantial shift in the fitness industry landscape. For locations that were open as of March 2020, about 4.96% of them closed in 2020. This percentage decreased to 3.31% in 2021, but then slightly increased again to 4.68% in 2022. As of now, 2023 has seen a relatively low closure rate of 0.55%.

Multisite & Expansion Brands

On average, it takes Hapana's clients about six months (175 days) to open the second location after an initial launch. This window allows brands to establish their roots and prepare for further growth. For a larger-scale expansion, it typically takes nearly two years (716 days) for fitness brands to reach the milestone of 20 locations. This timeline sheds light on the planning and strategic development involved in a significant brand expansion.

The great news is that, globally, the fitness industry is likely to grow over the next 12 months.

Our data also reveals that as fitness brands grow, their rate of expansion increases. Brands with two to 20 locations add, on average, about 0.76 new locations per quarter. Larger brands with 21 to 50 locations are scaling up at an impressive rate of almost nine new locations every quarter.

Meanwhile, those with more than 51 locations are setting a brisk pace, adding more than 10 new sites per quarter. This growth surge showcases the industry's ambitious spirit, especially among larger brands. Those with more than 51 locations are adding a new venue every nine to 10 days, while smaller brands exhibit a steady pattern of growth, also contributing to a healthy expansion trend in the industry.

Intriguing trends also have emerged in international expansion. On average, fitness brands take about six months to venture into foreign markets. This strategic approach indicates a focus on building a strong domestic presence before exploring opportunities abroad. The potential for international growth within the fitness industry is promising and offers exciting possibilities for brands seeking new horizons.

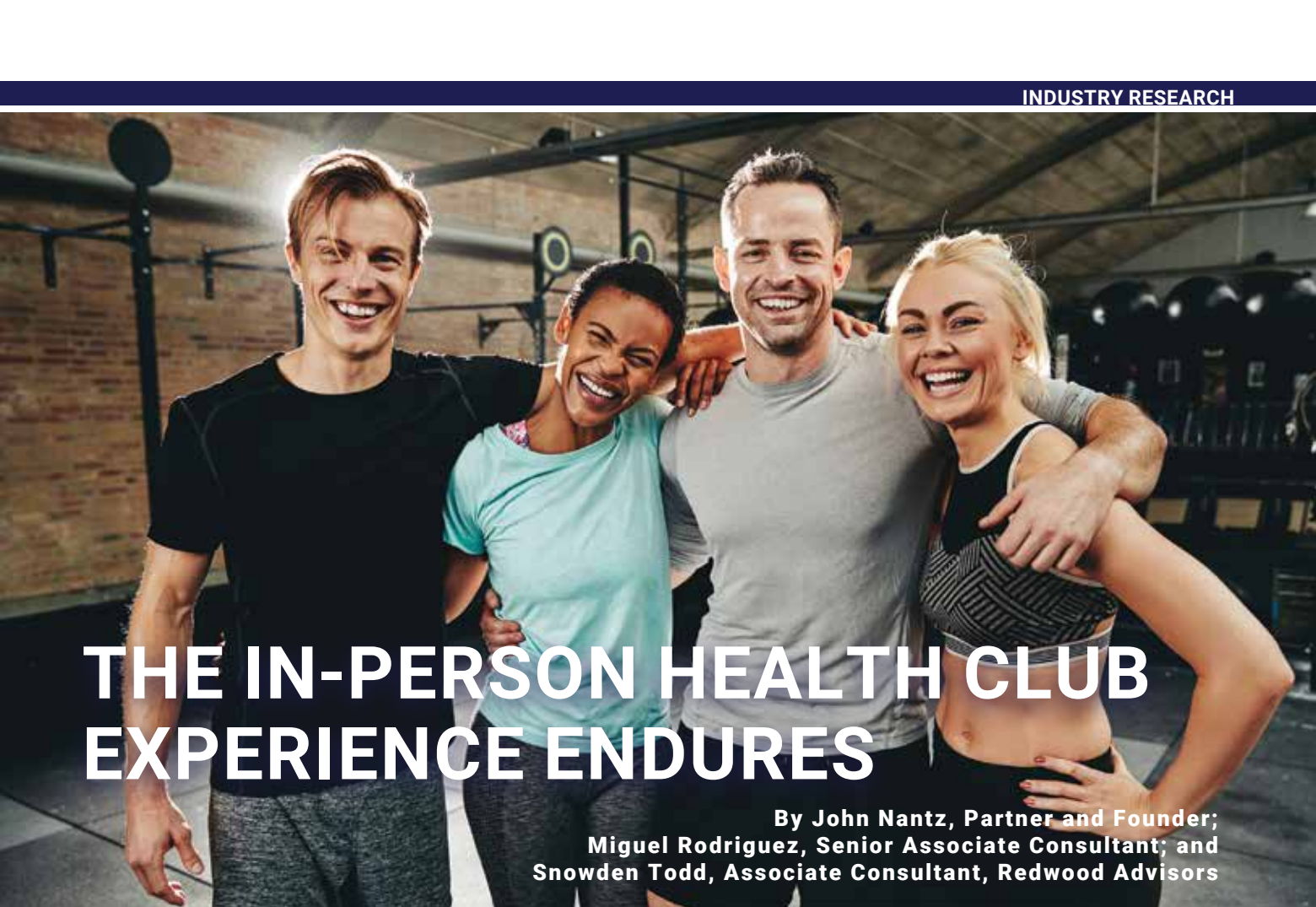
Industry Outlook

The great news is that, globally, the fitness industry is likely to grow over the next 12 months. However, we are seeing significant growth trends in Asia Pacific. The region is predicted to have the highest fitness market value at the end of 2023, followed closely by North America and Europe.

Total revenue for Asia is expected to show an annual growth rate (CAGR 2022-2027) of 9.66%, resulting in a projected market volume of \$1.13 billion by 2027. As many of Hapana's clients are expanding into Asia specifically, we know that the demand for boutique studios and brands is high, and we expect continuous growth for the region.

Within the boutique space, we predict a rise in the popularity of franchised Pilates and yoga studios with these specific modalities anticipated to garner \$269.3 million in the 2021-2028 timeframe, growing from \$127.7 million in 2020, a healthy CAGR of 10%. This predicted rise in popularity will be mainly due to a growing awareness of the benefits of Pilates and yoga, both linked to improved body posture and flexibility, as well as mental well-being and a more holistic approach to fitness and health.

As the fitness industry continues to evolve and grow, we are excited to see the potential of each region and look forward to experiencing the growth of all of our brands over the next 12 months.



THE IN-PERSON HEALTH CLUB EXPERIENCE ENDURES

By John Nantz, Partner and Founder;
Miguel Rodriguez, Senior Associate Consultant; and
Snowden Todd, Associate Consultant, Redwood Advisors

Although many industries struggled through the COVID pandemic, few faced the hurdles of health clubs and studios. On top of lockdowns that forced many gyms to temporarily close, fitness centers in the United States were routinely omitted from pandemic aid bills, while other arguably less essential industries, such as restaurants, received generous government support.

This did not reflect a lack of effort by the U.S. gym industry lobby. In the United States, the \$1.5 trillion omnibus spending bill passed on March 10, 2021, originally included a \$15.6 billion aid package for health clubs before that provision was scrapped. By August 2021, 22% of U.S. gyms had closed since the pandemic's start.

As gyms struggled, new narratives about the future of fitness took hold. Industry forecasters began to cast doubt on the viability of in-person gyms after the pandemic, citing the boom in at-home equipment and worrying consumer data. Indeed, a July 2020 TD Ameritrade consumer survey found that 59% of Americans did not intend to return to a physical gym post-pandemic. The survey seemed to forecast that the future of fitness would be at-home classes on high-tech equipment. In January 2021, Peloton's market cap peaked at nearly \$50 billion, a 500% increase from before the pandemic.

This marked the height of investor confidence in a future vision of fitness centered squarely in the home.

A Resilient Industry

Flash forward to today, and it's clear that doubts about the in-person gym industry were misplaced. In 2022, monthly visits to U.S. gyms were up roughly 13% compared to pre-pandemic levels for the same period in 2019, according to research cited by a September 6, 2022, *Wall Street Journal* article. For gyms that survived the pandemic, financials have similarly rebounded. Planet Fitness and Life Time achieved 29% and 16% profit margins respectively in 2022, according to their financial filings.

At-home fitness stars have simultaneously returned to Earth, with Peloton losing roughly 95% of its market cap since its peak, and aggressive at-home fitness maneuvers by giants such as Lululemon falling flat.

Middle-Tier Health Clubs Get Squeezed

Boutique (e.g., Orangetheory) and value players (e.g., Planet Fitness) have seen an outsized share of the gains. Thanks to small square footage requirements, boutiques in particular have seized on an abundance of vacant retail real estate and



Nantz



grown significantly. Driven by boutiques, U.S. fitness facilities more than doubled their net new retail space from 2 million square feet in the first quarter of 2021 to 4.5 million in the first quarter of 2022, according to real estate services firm CBRE.

The largest value player, franchisor Planet Fitness, seized on the surge in pandemic gym bankruptcies. In 2021, it consolidated its already strong position by opening more than 100 new gyms, largely at locations formerly occupied by now-bankrupt gyms.

Meanwhile, many mid-priced

gyms—those with membership dues around \$50—have struggled to find their footing in the post-pandemic world. For example, 24 Hour Fitness underwent significant staff cuts even as in-person activities ramped back up. Facing stiff competition from a growing Planet Fitness, 24 Hour Fitness unveiled its own \$10 per month membership in select states. With greater amenities from boutique and luxury gyms and with the abundance of low-price options, middle-tier players such as 24 Hour Fitness are struggling to sustain and grow their share of the market.

Missing the In-person Experience

Although not all gyms escaped the pandemic woes, the industry's overall rebound in the U.S. should put the doomsday narratives to rest. What did pessimistic pandemic forecasters miss? For one thing, in-person fitness maintains inherent advantages over at-home exercise, despite the best efforts of companies such as Peloton to recreate the in-person experience at home. Working out with others provides both motivation and bonding. Indeed, recent research from Les Mills found that people felt in-person group workouts were more enjoyable and their effort was higher when compared to the same workout performed at home.

The words of one boutique studio enthusiast quoted in a 2019 *New York Times* article about the growth of boutique

studios rings even truer post-pandemic: “[Peloton] doesn't have the same energy as the group experience ... and there is no one to go out for coffee with after.”

This isn't to say at-home fitness doesn't have an important role to play going forward. As recently as September 2022, 57% of Americans were still working out at home, compared to 26% who visited the gym weekly. But instead of at-home fitness supplanting the in-person experience, for many exercise enthusiasts, the two have proven complementary.

As Luke Carlson, founder of Discover Strength and an IHRSA board member, put it in a recent interview, “What we're actually finding in practice is that consumers are actually willing to pay for both in-person gym experiences and at-home fitness. Many see the services not as substitutes but as complements ... and consumers are willing to pay a lot more for all this than we expected.”

The number of hybrid exercisers (i.e., people who work out at home and at gyms) remains elevated, with 65% of those working out in 2022 opting for hybrid routines, compared to just 46% in 2020. Today, the vision of a fully digitized fitness landscape looks more like science fiction than reality.

For the gym industry, the COVID-19 pandemic proved a marathon, not a sprint. But for all the doom and gloom surrounding the space during the pandemic, surviving gyms look more robust than ever, with attendance numbers and profitability surpassing already strong pre-pandemic levels.

Innovations will continue to change where and how consumers work out, but health clubs and gyms should remain confident that the in-person experience offers valuable benefits that technology can only struggle to replicate.



Rodriguez



Todd



THE INDUSTRY'S FUTURE: HUMAN FIRST BUT TECH-FORWARD

By Geoff McQueen, Managing Director, Consumer Practice, and
Chuck Reynolds, Managing Director, Digital Practice, LEK Consulting

By now, it's well known that the COVID-19 pandemic had a profound impact on the fitness industry, fundamentally transforming how people engage with health and wellness. As lockdowns and social distancing measures forced the temporary closure of gyms, studios, and recreational centers worldwide, the industry faced unprecedented challenges in 2020 and 2021.

As a result of the economic uncertainty, a significant number of operators had to permanently close some or all of their locations with small independent gym operators being disproportionately affected.

However, the pandemic also underscored the value of in-person interactions and the unique benefits of community-driven fitness experiences. During the past 18 months, consumers have eagerly returned to brick-and-mortar fitness locations, fueling strong market growth in the wake of COVID and demonstrating the enduring strength and resilience of the fitness industry.

Although the U.S. and European markets were slightly below pre-COVID revenue at the end of 2022, both markets are expected to materially exceed pre-COVID levels in 2023, as consumers—particularly Millennials and Gen Z—continue to return to in-person fitness and operators open new locations to backfill the closures seen during COVID.

The pandemic transformed the fitness industry in a permanent way. Historically, key fitness stakeholders and operators had been slow to adopt new technologies, but the pandemic was a catalyst for the digitalization of the broader industry. This led to a dramatic increase in digital fitness content, digital-first products, and digital capabilities with new fitness companies entering the mainstream (e.g., Peloton, Tonal) and traditional fitness companies evolving or developing new offerings and processes to effectively compete.

Now It's Omichannel and AI

However, as consumers have returned to in-person experiences, digital-only products have become over-invested, and it is clear that the in-person element of fitness is critical to its ongoing success. Consumers are increasingly looking for unified omnichannel offerings where the in-person experience is enhanced by digital offerings, such as personalized recommendations, wearables integration, hybrid virtual/in-person group exercise classes, and other innovative technology deployments. To win in the future, stakeholders need to retain a human-first, tech-forward mindset to continue to be successful.



One emerging technology that could dramatically affect the fitness landscape is artificial intelligence (AI). Thus far, AI use in fitness is still nascent with the use cases primarily focused on new products and services for consumers. Examples include AI-driven personal trainers, personalized training plans, and nutrition and diet recommendations.

Although new AI-driven consumer services have gained the most traction in the market, they are just some of the areas ripe for potential AI application. There are considerable untapped opportunities across the broader fitness value chain to improve business performance, including sales and marketing, operational efficiency, and inventory/supply chain management.



Sales and marketing. With the democratization of AI tools, fitness operators can harness the power of hyper-personalization, crafting targeted marketing and promotional messages to optimize member acquisition, engagement, and retention. In addition, operators can deploy AI chatbots to offer tailored member assistance in real time, enhancing the overall user experience and fostering a stronger connection with the brand.

Operational efficiency. Companies throughout the value chain can leverage AI to improve operational efficiency and gain valuable insights into business performance. For instance, generative AI can analyze a wide array of available data (both internal and external) to recommend staffing levels based on when incremental resources are required or to proactively identify and predict potential areas of underperformance, enabling operators to take preemptive action to eliminate or reduce any significant negative impact on P&L.

Inventory and supply chain management. Commercial and home fitness equipment manufacturers can also significantly enhance their inventory and supply chain management through the strategic deployment of AI tools. By leveraging AI, they can accurately predict shifts in demand, enabling proactive adjustments to inventory levels and avoidance of stockouts or overstock situations.

Adding Value and a Competitive Advantage

These applications of AI, along with many other possible use cases, have the potential to create substantial value for operators, franchisors, equipment manufacturers, software providers, and other key stakeholders throughout the value chain, but they are largely untapped today. Early adopters of AI among fitness companies may gain a competitive advantage across customer experience, organizational effectiveness, and supply chain management.

As with any emerging technology, it can be daunting to identify and understand how your organization can best deploy AI-related solutions. To maximize the chances of success and overall adoption within the organization, companies should focus investments on priority areas of the business and deploy specific targeted use cases. Initially, organizations should start with three key steps to enable successful deployment and adoption.

1. Align areas of emphasis with your core strategy.

Investing in areas already deemed important aligns incentives and limits “shiny object” syndrome where organizations invest in technology for technology’s sake vs. delivering real value. It’s important to understand the strategic objectives and leading and lagging metrics to measure success before starting to identify AI solutions.

2. Identify core use cases and existing processes.

With an understanding of the areas of strategic importance, identify the existing processes and use cases of AI that can improve the necessary metrics. This can focus on increasing revenue, on enabling increased personalization for customer growth or cost management, or enabling more efficient deployment of labor (e.g., scheduling optimization) or capital (e.g., demand forecasting and inventory management). Based on the identified use case, determine if an AI solution is best built in-house or through vendors/partners, and then determine the appropriate internal and external data to train the models.

3. Establish ownership and measure progress. Successful deployment of AI is not limited to IT and requires business/functional ownership enabled by IT. A clear ownership model from the business and the alignment to key metrics against the strategic plans will give a clear baseline and ability to assess impact of a solution. When deploying any solution, confirm the measurement plan and hold those involved accountable to deliver results, quickly adjusting—or canceling—any broad deployments that are not creating value for the organization.

With the increased level of data and an understanding of how to create tech-enabled human experiences, AI can deliver immense value. Given the increased focus and attention on the topic of AI, and the applicability across an organization, deployment is becoming increasingly simplified. At the same time, obtaining value from these solutions is more important than ever.

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Country Insights:

Perseverance, Advocacy Pay Off as Signs Point to Fitness Industry Growth

One of the biggest bright spots for many countries is the increased focus that consumers have on wellness, especially among younger people who are starting their fitness journeys. That focus could lead to greater investment and expansion in the industry.

Despite recent hardships and the continued impact of inflation on many health clubs and studios during the past three years, the health of the fitness market is steady with signs of growth for most regions of the world, according to the federation leaders and strategic partners who share their insights on the following pages about the state of the health and fitness industry in their countries and regions.

Much of the anticipated growth will occur because consumers increasingly are focused on their well-being and have taken note of the role that physical activity plays in that.

This section of the report gives voice to the triumphs, challenges, and ongoing advocacy efforts related to health and fitness in most regions of the world.

Australia

BY BARRIE ELVISH, CEO, AUSACTIVE

Although unemployment rates remain at record low levels and inflation is showing the first indications of coming down—as with the majority of OECD (Organization for Economic Co-operation and Development) nations, Australia is entering an economic climate that has a degree of uncertainty.

Over the past year, 12 interest rate increases have led to concerns over the cost of living, from mortgage rates through to basic consumables. This, in turn, has led economists and media pundits to question which consumer discretionary purchases are most at risk.

Regarding gym memberships, opinions are divided. Recent commentaries seem to be contradictory about whether or not health and well-being related purchases are at risk. However, the consensus appears to be that expenditures in these sectors will be one of the last to be sacrificed, as consumers place a higher value on health than on eating out or other forms of entertainment.

Exceptions remain in the central business district (CBD) areas of Sydney and Melbourne, since many businesses are still functioning on a part-time work-from-home basis, meaning that the foot traffic is not available to facilities operating in CBD sites.

However, a significant number of AUSactive members have indicated that memberships are now in excess of pre-pandemic levels. If every cloud has a silver lining, COVID has significantly increased community awareness of the importance of exercise and physical activity to improve and maintain not just physical but mental fitness as well. This increasing awareness is translating into new gym memberships.

AUSactive and the Government

Given that Australia's new federal government has stressed that its future economic decisions will be informed by community well-being considerations and the need for the government to deal with a major COVID-induced national debt—especially with health-related costs—I am confident that the industry will continue its positive trajectory.

The government has announced the development of a national physical activity strategy that will be advanced in consultation with key stakeholders, including AUSactive. This initiative is in line with an increased awareness of the importance of preventive health and subsequent policy and funding priorities. As our sector is an integral element of effective preventive health strategies, we are well placed to support government strategies through expanded gym memberships.

Adequate Staffing Is an Issue

An unfortunate by product of COVID has been the loss of 50% of our workforce, and as gyms continue to recover and expand, the shortage of trained and experienced staff is becoming a major problem. This is exacerbated by lower-than-normal enrollments and higher-than-normal dropout rates experienced

by the relevant education providers during COVID, leading to a reduced number of graduates.

While this situation is improving, the industry is also facing an aging workforce, potentially leading to another skills shortage in the near future when the existing workforce reaches retirement age.

Trends in the Industry

Over the past 12 months, many franchise groups have experienced growth both within Australia and offshore. Generally, membership growth has continued, with recent data indicating that almost 35% of Australians over the age of 15 go to the gym or use the services of a personal trainer at least once a year.

After recreational walking, going to a gym is the second most popular physical activity for this age cohort. Females continue to outnumber their male counterparts, and the gap is widening. Gyms are also becoming more proactive in adopting inclusive practices with specific foci on baby boomers, members with special needs, and marginalized communities.

“COVID has significantly increased community awareness of the importance of exercise and physical activity...”

AUSactive and Its Advocacy

AUSactive continues to advocate for several reforms that support recognition of the critical role that we play in preventive health. These include an expansion to all states of the Queensland government's decision to classify gyms as “essential,” a review of the private health insurance industry to enable gym memberships to be fully covered, a similar reform to enable a capped tax deduction and/or the removal of fringe benefit tax imposed on gym memberships, a government-funded public health campaign promoting physical activity, and the removal of artificial barriers between our sector and allied health.

These will all be progressed on the underlying assumption that, in the near future, questions of industry governance, accreditation, and accountability will need to be addressed if we want to be taken as a serious and invaluable stakeholder in Australia's preventive health environment.

To support these high-priority advocacy strategies, we partnered with Myzone to launch a Fit for Office four-week campaign wherein federal politicians had a friendly competition to assess how many reached the WHO-recommended physical activity guidelines and proved they were “fit” for office.

Appropriate media commentators also competed, and we maximized media coverage to generate an ongoing community discussion that supports the desired industry transition to preventive health.

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Brazil

BY GUSTAVO ALMEIDA, CEO, FITNESS BRASIL

Brazil is now experiencing the first year of a new government—the third non-consecutive term of President Luiz Inácio Lula da Silva (Lula) after his 2003-2007 presidency and 2007-2011 reelection. Fortunately, things are better than some of us were expecting after the results of the October 2022 election.

Inflation is under control, at about 4% a year, considered a low standard historically, and close to the 3.25% target. The dollar exchange rate is varying a little below R\$5.00, usually from R\$4.70 to R\$5.00. Last year, it varied, usually from R\$5.00 to R\$5.35.

Although Brazil's interest rate is still high, the Central Bank has just reduced it from 13.75% to 13.25%, a decision made in early August. It will be reduced more over the next months, the Central Bank indicated. But it's still considered high for the business environment to motivate entrepreneurs to invest as well as for consumers to take on more credit.

Earlier this year, the government pressured Brazil's Central Bank to reduce interest rates more aggressively. However, the Central Bank is justifying its cautious decisions, pointing to the global instability caused by the effects of the war in Ukraine and locally by talk of tax reform, among other factors.

Tax Reform and ACAD

For decades, tax reform has been one of the most expected reforms in Brazil. Finally, it looks like it will be approved this year or next, although many important details need to be worked out.

Regarding tax reform, the health club industry has been fighting for years to have the government incentivize businesses that encourage people to become more active. As of now, hospital services enjoy reduced taxes in Brazil, but physical activity centers do not. Offering this incentive only to businesses that treat health issues and not to businesses that promote health is a paradigm that needs to change.



Since the discussion over our tax system and its reform is now part of both the executive and legislative agenda, it now has the spotlight of the media. This might be the best opportunity for reform, the one that we have been hoping for.

ACAD, the Brazilian Club Association, is playing a fundamental role with our public officials. Fitness Brasil has launched the second edition of its *Sector Overview* in partnership with the accounting firm EY—with both English and Spanish versions—to bring more data and information to the table. Every stakeholder needs to roll up their sleeves to create what might be a game-changer for our entire industry. The dream is to have a 0% value added tax (VAT) for clubs, similar to that in countries such as Norway.

This might be the best opportunity for reform, the one we have been hoping for.

More Positive News for the Industry

Meanwhile, Brazilian clubs are in a good place, with more members looking for our services. Growth in consumer interest stems from people being more conscious since COVID-19 about the importance of healthy living, and with the permanent closure of so many clubs due to COVID, remaining clubs are reaping the benefits of this newfound health focus.

We have an amazing opportunity to offer new club members the chance to change their lives—by delivering a great experience and ensuring they get the results they need.

For consumers who want to join a gym, the opportunities to do so are bigger and better than ever. People can now choose from a wide variety of classes in different business models, from beach tennis to ballet, from a single class experience to a recurring subscription.

Franchise opportunities have also been growing, increasing the opportunity for new investors to enter our industry.

Finally, suppliers continue to offer leading-edge technology to help our industry grow with outstanding fitness equipment, management software, gym aggregators, and EdTech. Club operators and managers can choose from many good partners who can help them to drive and improve their businesses to create a better future not only for themselves but also for more than 200 million Brazilian citizens.

fitnessbrasil.com.br



Canada

BY SARA HODSON, PRESIDENT OF FIC; GABRIEL HARDY, EXECUTIVE DIRECTOR OF FIC; ERIN PHELAN, COMMUNICATIONS DIRECTOR OF FIC

The Canadian fitness industry is in a state of epic transformation, recovering and rebuilding from the last three years. Although COVID affected every corner of the world, Canadians experienced the world's longest lockdowns, and the aftermath is still being felt in the Canadian fitness industry. Even with the high cost of inflation and the fact fitness business owners took on significant debt loads from March 2020 to 2023, there is optimism that a renewed focus on the vital importance of physical activity to reduce healthcare costs will help our industry not simply rebound but evolve into a powerhouse.

Canadian fitness owners are rebuilding their businesses, attracting back former members, gaining new members, and addressing the urgent need for physical activity for all while staying competitive within the new hybrid fitness world. However, more than 50% of business owners are not sure how they will repay their debts before a looming December 2023 government deadline. Still, optimism is high for the fitness industry's future.

The Fitness Industry Council of Canada (FIC), the not-for-profit association of the Canadian fitness industry, is closely monitoring the situation. Its mission is to support, promote and protect the fitness industry. It achieves this goal through nurturing relationships with government leaders, lobbying efforts, and connecting fitness owners to work together toward common goals.

Canada's Economy

The current challenges facing the Canadian industry are similar to those in the United States: regaining members, repaying debts incurred during the pandemic, steady growth in a slowing economy, and attracting and retaining staff. GDP growth is low in Canada (0.8% as of June 2023), but the rate of inflation is cooling (2.8% as of June 2023). Labor shortages are prevalent with low unemployment levels (5.4% as of June 2023) and low vacancy rates. Although economic growth is slow, it is expected to pick up in the third and fourth quarters.

The Fitness Landscape, Noteworthy Trends

Even though Canada is dominated by large fitness brands, according to a survey conducted by FIC, the majority of Canadian fitness businesses are owned and operated by sole proprietors (82.5% of respondents own one location). After COVID, 58% of survey respondents say they have fewer members now than in March 2020. At the height of the pandemic, two-thirds of Canadians had paused or canceled their memberships, while online fitness providers and home gyms flourished. Group fitness and personal training continue to be strong trends, and 50% of gym owners offer both in-person and online options. It is estimated that between 10% and 25%



Hodson



Hardy



Phelan

of Canadian fitness businesses were forced to permanently close between March 2020 and July 2023.

As for trends, functional fitness, active aging, group fitness, express workouts, and recovery are among the top 2023 trends. The use of technology—both in our businesses and for our members tracking their workouts and metrics—continues to grow. FIC club operators report that their members use the gym to improve physical, mental, and social health more than for stand-alone physical gains. Revenue from personal training has increased since the pandemic ended. Gen Z and Millennials are the fastest growing demographic.

FIC club operators report that their members use the gym to improve physical, mental, and social health more than for stand-alone physical gains.

FIC's Lobbying Efforts and Initiatives

FIC works closely with provincial and federal governments, as well as with the Canadian Federation of Independent Businesses, lobbying on behalf of the fitness industry. FIC continues to argue that gyms play a pivotal role in both the prevention and treatment of chronic health conditions, mental health, and social health, such as the effects of loneliness and isolation.

In 2021, 2022 and 2023, FIC proposed that the government revise the personal income tax section of eligible medical expenses to allow Canadians to claim their gym memberships against their taxes, arguing that significant data shows that being physically active will save the Canadian healthcare system billions of dollars annually.

In 2024, FIC will lobby the government to remove the federal tax for gym memberships, arguing that exercise and physical activity are essential services.

Provincial Lobbying

In British Columbia, the most western Canadian province, FIC has hit a historic milestone, working closely with the provincial

parks and recreation association, as well as Pacific Blue Cross, the largest benefits provider, developing a pilot project to subsidize gym memberships for nurses. Although the deal has not been inked, the objective is to track the physical and mental health improvements of nurses, which would be measured by quantifiable markers such as reduced prescription claims, improved productivity, fewer sick day claims, and a qualitative assessment on mental health. FIC is working closely with the Ministry of Health to build a business case to be presented to the government this fall and hopes to implement this pilot project early in 2024 with the objective of gathering data and proposing a similar project across all Canadian provinces.

Lobbying Success

In March 2022, the government of Saskatchewan, a central province in Canada, announced that it would implement a 6% tax on “recreation” such as sporting events, casinos, and gyms. FIC quickly mounted a strong campaign in the media, attending the question period in the legislature and engaging in a postcard writing campaign. It argued that gyms are essential for physical and mental health, and should not be placed in the same category as “leisure facilities.” In August 2022, the government of Saskatchewan reversed the decision on this proposed tax on gyms.

FIC meets regularly with high-level officials and is invited to private and public roundtable discussions on the importance of physical activity in Canada. FIC will be submitting a proposal for budget consultations and hopes to move the needle on inactivity in Canada by 2030. The Government of Newfoundland and Labrador introduced a CAN\$2,000 physical activity tax credit in 2021, with the hope of making the province the fittest in Canada by 2030. FIC continues to shine a light on this in its discussions of what is possible in Canada.

FIC protects the industry in ongoing efforts, such as negotiating reasonable licensing fees for music in our clubs and working on beneficial partnerships.

A Bright Future for the Industry

FIC has also been gathering data and working with programs such as Canada's Prescription to Get Active to align the fitness industry with improved physical and mental health outcomes through exercise prescriptions that connect fitness with health-care. Data gathered from Sheffield University in the United Kingdom, released in August 2022, found that work done in sports and physical activity centers saves the Canadian taxpayers CAN\$6.2 billion annually, preventing 2.2 million cases of chronic health conditions. The more FIC consistently argues that exercise improves physical and mental health and that the Canadian fitness industry is essential for the physical and mental health of Canadians, the more we move our mission forward.

Even More Hope on the Horizon

In a July 2023 cabinet shuffle, the Canadian federal government renamed the Ministry of Sport to Ministry of Sport and Physical Activity, a clear recognition of the importance of physical activity for Canadians.

ficdn.ca

China

BY ARTHUR YAN, GENERAL MANAGER, CHINAFIT, AND
FRANCES FAN, DIRECTOR, CHINAFIT

Overall, China's economy maintains a recovery momentum. From 2022 to 2023, large traditional fitness clubs have been grappling with the issue of rising operational costs, which, in turn, has placed some strain on their capital chain, leading to a decline in their business performance.

Consumers have been exhibiting increased prudence in their spending habits as economic uncertainties linger, which is diminishing the suitability of traditional yearly or multi-year membership models for current consumption patterns and scenarios. Instead, membership dues are moving away from yearly contracts to more flexible monthly options.

Looking toward 2024,
competition will intensify,
but the outlook is positive.

Studios, particularly those emphasizing Pilates, have been displaying notably stronger performance as have health clubs with a strong social media presence and online offerings.

Internet fitness companies have risen as strong contenders, with players such as HiLeFit, Super Monkey, and WeGymer experiencing robust growth in the emerging small fitness club and studio market. HiLeFit, established in 2015, has now expanded its presence with more than 1,200 stores nationwide and a registered membership exceeding 10 million. Both Super Monkey, known for its pay-per-use model, and Zhongtian Fitness, which offers a short-term card payment, have garnered increasing recognition from consumers, many of whom praise the user-friendliness of these models.

Looking toward 2024, competition will intensify, but the outlook is positive. Although some traditional clubs may phase out, the rise of innovators and smaller clubs—such as 24-hour gyms, boutique studios, and small group training—will propel the industry's overall recovery and development.

Three Major Trends

In addition, these trends are emerging in China's fitness industry:

1. Move to monthly dues. A shift is emerging from yearly membership dues to monthly payments because consumers are increasingly demanding flexibility and convenience along with aiming to minimize potential losses.

2. Growth in smart gyms, small clubs, and studios. Emerging smart gyms, small fitness clubs, and unique studios will gain a larger market share in the future, surpassing the popularity of traditional large fitness chains.

3. Online and offline models. Business models with a broad market presence both online and offline will have the opportunity to cater to greater consumer demands and cultivate even stronger customer loyalty.

Three Opportunities

These three opportunities exist for the fitness industry in China:

1. Skillful use of social media. The power of social media will bring accelerated opportunities for certain emerging operators. For instance, WeGymer in Changsha has grown, in part, due to its social media presence.

2. Cutting-edge technology. Technological advancements will integrate intelligent products with professional services, elevating the overall user fitness experience.

3. Policy guidance. This will foster a more regulated fitness market, one example of which is pre-paid fund supervision policies.

Three Major Challenges

Despite these opportunities, the industry faces these three challenges:

1. Economic impact. The pace of economic recovery and growth will play a decisive role in shaping the future development of the industry.

2. Staying current. Industry professionals, particularly investors, must demonstrate determination, swiftness, and capability in updating and enhancing their business concepts and measures.

3. Operational skill. Clubs and studios aiming for further development will require more sophisticated operational capabilities such as enriching products, enhancing coaches' proficiency in online and offline deliveries, and improving user retention through digitized management processes.

CHINAFIT's Work on Behalf of the Industry

Since the outbreak of the pandemic, CHINAFIT has consistently launched online forums and interviews, providing more opportunities for the fitness industry to communicate online. Numerous industry managers have engaged in reviewing, summarizing, and forecasting the industry's performance on our social media platforms.

Meanwhile, CHINAFIT successfully organized a series of in-person conferences including exhibitions and conferences held in Beijing, Changsha, and Shenzhen from 2022 to 2023 and CHINAFIT/IHRSA China Management Forum (Shanghai) in 2021. These endeavors have provided a valuable in-person platform for communication within the fitness industry.

At the forefront of CHINAFIT's work has been regulating and promoting the healthy and sustained development of the industry. The following findings inform our work:

■ In 2021, the State Council released a circular to push forward a new five-year extensive mass fitness program, spanning from



ChinaFit.com

2021 to 2025. According to the circular, 38.5% of the population will be regular participants in physical exercise by 2025, and the sport industry should see a value of 5 trillion yuan by 2025.

■ In 2021, the State Sports General Administration released the "14th Five-Year Plan for Sports Development (2021-2025)." The development of Internet + Fitness and Internet of Things + Fitness models will be promoted. China will build itself into a modern leading sports country by 2035.

■ In 2022, the General Office of the Communist Party of China Central Committee and the General Office of the State Council released a set of guidelines. According to the document, China plans to build a higher level of public service for fitness and physical activity systems. More than 45% of the population will frequently participate in physical exercise by 2035.

■ In 2022, the Standing Committee of the National People's Congress published the "Sports Law of the People's Republic of China." It stated that a national fitness strategy will be implemented and a public fitness service system will be established to encourage people to participate in physical exercise. China will promote the deep integration of national fitness and comprehensive health.

■ In 2023, "Implementation Rules for the Supervision of Prepaid Consumption in the Sports Industry in Beijing (Trial)" was issued by Beijing Sports Bureau, Beijing Market Supervision Administration, Beijing Local Financial Supervision and Administration Bureau, Business Management Department of the People's Bank of China, and Beijing Regulatory Bureau of the China Banking and Insurance Regulatory Commission. According to the document, sports and fitness clubs, sports training centers, sports venues, and other entities that require payment prior to services in the administrative area of Beijing must now report to the government and open a prepaid fund account for supervision.

ChinaFit.com

Germany

BY ALEXANDER WULF, MARKETING AND PUBLIC RELATIONS, DSSV

At the end of 2022, health and fitness facilities in Germany had 10.3 million members, which was the membership level in December 2020 but still short of the 11.7 million members the country had in December 2019.

The German fitness industry began to grow again as soon as the government phased out COVID restrictions in the first half of 2022. As of December 2022, the industry counted approximately 9,150 fitness facilities and recognized an annual turnover of €4.9 billion. This is growth of 123% compared to 2021.

This positive trend continued in the first half of 2023. Around 400,000 new members were recorded in the first six months of 2023. The total number of people who actively train in a gym currently amounts to 10.7 million, which corresponds to 13% of the German population. If the main target group is considered—the population between ages 15 and 65—then the penetration rate in Germany reaches 20%.

On average, fitness studios recorded membership growth of just under 5% in January 2023 alone; that's 60% more members than in January 2022 and even surpassed pre-pandemic numbers. Gyms increased their membership growth by 5% compared to January 2020.

In addition to membership growth, training frequency also increased. In the first half of 2023, members visited the gym on average 25% more often than in 2022.



Wulf



aktiv fitness club is a premium club with seven locations in Germany.

A Mixed Outlook

Despite these positive numbers, clubs and studios still face challenges, and the overall industry will need at least until the end of 2024 to recover from the negative effects of the pandemic. The energy crisis weighs heavily on the fitness industry while high inflation and rising costs (e.g., personnel costs) are making things even more difficult for individual companies.

Although 41% of fitness studio operators assess the economic situation as good or rather good, about 40% consider the economic situation of their companies to be bad or rather bad, according to a DSSV survey.

More than a third (34%) of fitness businesses have regained their average membership level per location from December 2019, but 35% of operators estimate that they may not fully recover from the crisis before the end of 2024—or even beyond.

In addition to membership growth, training frequency also increased.

Still, since the pandemic, Germans have become more interested in staying healthy. People are increasingly recognizing the health benefits of working out in a gym and are making a conscious decision to join health and fitness facilities. This shows that the industry is well received by the general public. The goal is clear: more movement for more health.



DSSV seeks political recognition of the fitness industry, including Balance Fitness, a German health club company.

The DSSV and Its Successful Advocacy

In addition to seeking political recognition of the fitness industry, the DSSV's primary concern is to deal with the effects of the current crises, as well as to represent the interests of fitness companies in Germany.

At the Parliamentary Evening 2023 in Berlin, the DSSV called for more acceptance for the industry. Under the motto "Fit & Healthy in Germany—gyms move the country," the discussion among fitness industry representatives, researchers, physicians, health and pension insurers, and federal politicians concluded that there is only one solution in the fight against physical inactivity: exercise, ideally through a competently staffed gym.

Only together will it be possible
to prevent the increasing
lack of physical activity.

Two recent research projects were presented at the event. Both involved the first-ever cross-institutional cooperation of the health and fitness industries with politicians and public health insurance—and within the framework of a post-COVID study, also with medicine.

The goal is for these institutions to work together to ensure that the population has access to low-threshold offers for regular fitness training in gyms under professional guidance. Only together will it be possible to prevent the increasing lack of physical activity.

An Annual Initiative May Offer a Boost

To increase the recognition of health and fitness facilities in politics and health systems, the DSSV is promoting participation in the #BEACTIVE DAY. This Europe-wide campaign takes place every year on September 23 at the beginning of the European Commission's European Week of Sport. Aimed at making exercise fun and highlighting the importance of physical activity for people's physical, mental, and social well-being, this initiative organizes thousands of free events and activities for all interested parties across Europe.

For the third year in a row, DSSV is the national coordinator in Germany for the pan-European #BEACTIVE campaign. On September 23, those who are interested in training are invited to participate in one of the more than 600 events in German gyms, to try out training offers, and to become part of Europe's biggest exercise event. Together with the European Commission, EuropeActive, and all participating fitness businesses, DSSV is pursuing the goal of "More people, more active, more often!"

dssv.de

Ireland

BY KARL DUNNE, CEO, IRELAND ACTIVE

Ireland Active is the national representative body for leisure centers, gyms, swimming pools, and commercial sports facilities in Ireland. The sector employs approximately 12,000 people in roles such as lifeguards, swim teachers, fitness instructors, sports coaches, and operational staff.

At this time, the Irish economy has weathered the COVID-19 pandemic and is coping well—despite repercussions from the war in Ukraine. Although Ireland's fiscal position is currently strong with buoyant revenues, a number of pressures have arisen from aging, housing, health, and climate change that create fiscal risks in the longer term.

The government's ongoing and planned investments to boost the affordable housing supply and to lower greenhouse gas emissions should be accompanied by reforms to reduce regulatory and legal hurdles, uncertainty, and high transaction costs.

In 2022, consumer expenditure on sport-related goods and services in Ireland was €3,341.6 million or 3.1% of total consumer expenditure. Sport-related expenditure continues to grow, both in absolute terms and as a percentage of overall consumer spending. A large part of this spending on sport is directed toward participation subscriptions (which include membership dues) and sports club fees.

Significant growth has been happening in the country's fitness sector, just as it is throughout much of the European



In Ireland, spending on sport-related goods and services continues to grow.

Union. It includes spending on sport clothing and footwear (€568.8 million), and admissions connected with participation (€427.2 million).

However, a large part of consumer spending on sport is directed toward gym membership dues and fees. The biggest spending categories are subscriptions to sports clubs (€622.9 million), followed by sport clothing and footwear (€568.8 million), subscriptions to fitness (€490.9 million), admissions related to participation (€427.2 million), and sport goods and bicycles (€345.2 million).

Irish Leisure, Health and Fitness in Numbers

Personal exercise (16%) and swimming (9%) are the two sports with the most adult participation in Ireland—more than the three major field sports (Gaelic Athletic Association, rugby, and soccer) combined—and as such, they require serious consideration and engagement when deciding on matters regarding public health. The numbers for Ireland, which has a population of 5.1 million people:

- 590,000 adults exercise in gyms each week
- 300,000 adults swim in pools each week
- 200,000 children participate in swimming each week

Although the Irish fitness market is less penetrated than other markets in Europe, it has a comparatively high share of clubs per inhabitants compared to other European countries.

Generally, leisure, health, and fitness facilities in Ireland have recovered well after the pandemic. However, members have returned more slowly to city center clubs due to companies adopting a work-from-home/hybrid model. Budget gyms have continued to grow in the sector along with the opening of high-end facilities.

Ireland has the third highest proportion of people who are active (95%) at a fitness club, at home, or outdoors. In terms of regular fitness participants who work out at least once a week, Ireland again leads the European comparison with a total share of 71%.

Ireland Active Lobbying on Behalf of the Industry

Ministers and officials of the Department of Tourism, Culture, Arts, Gaeltacht, Sport and Media have also been supportive of our efforts to deliver on government policy and gain support for the sector. Our lobbying work continues, and a number of the measures in the 2022 budget were called for by Ireland Active, including the extension of the wage subsidy scheme, improved restart grants, low-cost loans, a commercial rates exemption, swimming pool grants, and standard VAT rate reduction.

Ireland Active's advocacy work continues to gain more support for the sector. Our goals are:

1. A 5% VAT rate on sports facilities
2. Energy gym and swimming pool subsidy grants



Compared to other European markets, Ireland has a high share of clubs per inhabitants.

3. Implementation of the Employee Exercise Scheme
4. A sports capital scheme, to include energy works grants
5. A commercial rate exemption for sports facilities
6. Energy subsidy grants to ensure the viability of sport facilities

National Sports Policy

The government's National Sports Policy provides the policy context in which sport and physical activity will operate over the next 10 years. Ireland Active strongly endorses the National Sports Policy, and we are part of the Sport Leadership Group that agreed to the actions contained in the policy.

As the recognized association for the leisure, health, and fitness industry, Ireland Active will have a lead role in some of the key operational and strategic challenges contained within the policy.

The organization plays a key part on government committees that directly affect the sector:

- Being a part of key government committees
- Member of an Irish Government Sport Leadership Group chaired by the Minister of Sport, which gives Ireland Active direct access to the minister
- Member of an Irish government national swimming strategy work group
- Member of a National Standards Authority of Ireland National Standards Committee
- Member of an Irish Physical Activity Research Collaboration Committee

irelandactive.ie

Exercise Intelligence

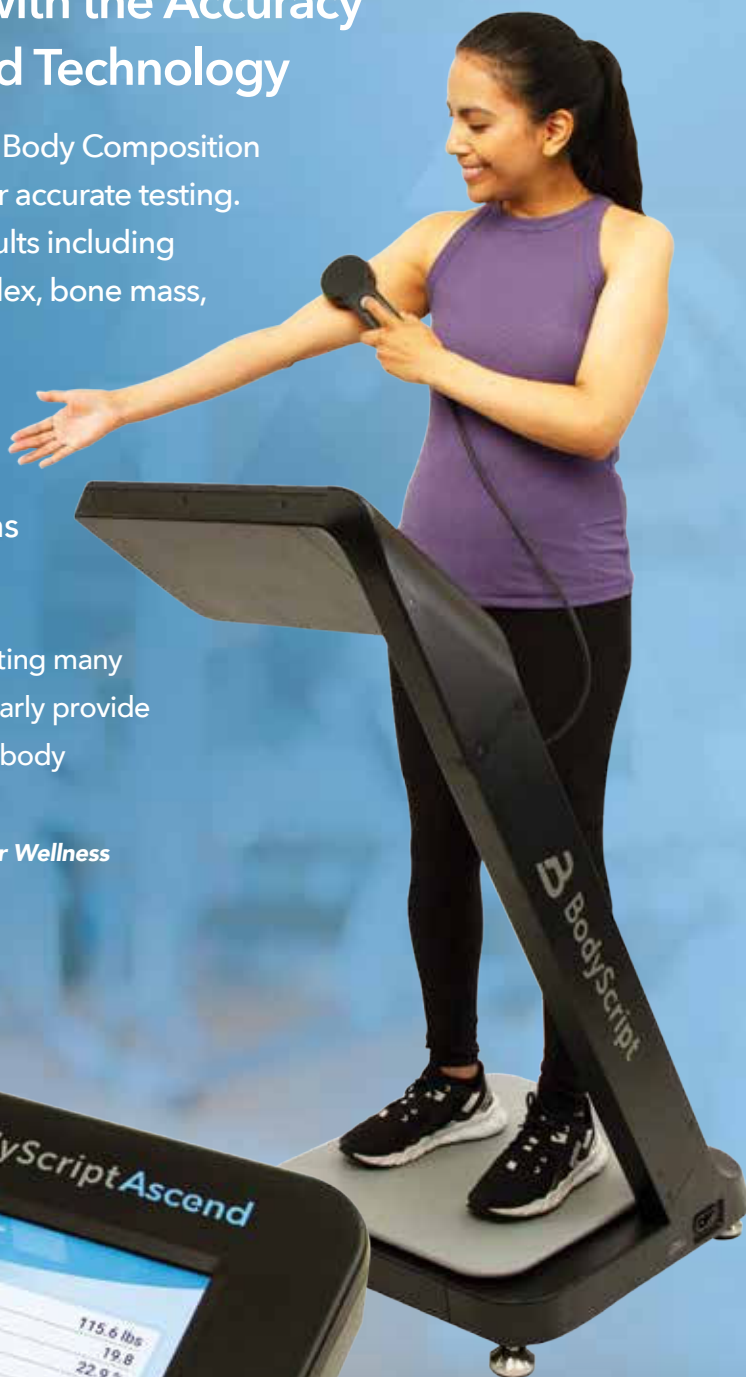
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Japan

BY TAKENORI FURUYA, EDITOR-IN CHIEF OF FITNESS BUSINESS, AND PRESIDENT OF CLUB BUSINESS JAPAN INC., AND TOMOKO IWAI, MANAGING EDITOR AND VICE PRESIDENT OF CLUB BUSINESS JAPAN INC

The Japanese economy is experiencing a slow recovery, mainly driven by domestic demand against the backdrop of the normalization of economic activities. It is expected to maintain growth in the 1% range in FY2023 and beyond, led by domestic demand.

Personal consumption is expected to continue to recover, driven by rising wages, although there will be some downward pressure due to high prices.

Capital investment will likely see steady progress in medium- to long-term investment in areas such as digitalization and decarbonization. Exports are expected to remain firm due to a pickup in the Chinese economy and a recovery in inbound consumption. Consumer prices are expected to grow above 2%, on average, in both FY2023 and FY2024, due to the spillover of wage increases to service prices.

The Bank of Japan (BOJ) will probably proceed with a review of yield curve control, including the elimination of the long-term interest rate guidance target by the end of FY23. Real GDP is projected to grow 1.5% year-over-year in FY23 and 1.2% year-over-year in FY24, according to Mitsubishi Research Institute forecasts, which are unchanged from the previous March forecast for both FY23 and FY24.

The Pandemic Prompts Change

COVID has converged. Fitness business performance in Japan is slowly recovering, but it is still running at -10% in sales and -20% in membership in 2023, compared to its pre-COVID performance in 2019.

With the COVID disaster, the previous “formula for success” has collapsed, and the structure has shifted from the one in which existing major players had been developed to a new “formula for success” that the emerging chain companies are now developing. They include RIZAP Group, Curves Japan, and Fast Fitness Japan. This formula has undergone these five major changes:

1. From large general stores and real services in urban centers, to small stores and hybrid services in rural and residential areas.
2. From crowded, popular environments, to safe and secure environments that avoid overcrowding.
3. From efforts to reduce prices and appeal to customers, to increased unit prices by devising pricing, raising prices, and selling optional products.



Furuya-san and Iwai-san

4. From the use of on-staff and full-time employees, to use of outsourced and part-time workers, and the promotion of a small number of elite employees.

5. From providing facilities, to optimizing services for each individual.

Although the major crisis under COVID has passed, the fitness penetration rate has not grown as much as expected, and organizations that cannot take advantage of their dynamic capabilities are finding it difficult to survive. This is truly a situation where the notion of “change or die” (according to a theory by writer Alain Deutschman) is appropriate.

Looking 10 years into the future, the following things are needed for companies to survive:

- Liquidating existing businesses
- Engaging in cash-generating services
- Engaging in new businesses that will become their core business in the future

In addition, companies must promote the creation of organizations in which individuals can thrive through human resource development and organizational development initiatives. Companies that can do this will be able to grow in 2024 and beyond.

The keys to growth are:

- The establishment of a differentiation strategy (quality growth)
- The clarification of key business factors for purchasing
- The implementation of a habit-forming system

Trends, Challenges, and Opportunities

The Japanese fitness market has been more affected by the COVID disaster than other countries, and many consumers are still afraid to go to fitness clubs.

Add to this the political and economic slowdown that has been going on for 40 years, symbolized by the term “lost Japan” and the resulting economic slowdown, and the participation rate has become even more sluggish. In addition, companies that had focused on health promotion as employers prior to COVID have tended to pull back on their efforts.

On the other hand, opportunities include the growth of swimming schools and other children’s schools, private fitness companies’ efforts in the designated management of public facilities, the private sector’s use of health policies in local governments and school-related sports and physical education, and the rise of peripheral services such as digital health insurance services by Sumitomo Life Insurance Vitality and others.

The rise of peripheral services, as well as the growth of the aforementioned emerging fitness chains, means that there is still room for new value-added businesses to enter the market.

Finally, using business revitalization subsidies, fitness companies have added new businesses such as simulated golf courses and 24-hour gyms, and swimming schools have built new fitness facilities, and so on.

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Latin America

BY GUILLE VELEZ, EDITOR, MERCADO FITNESS

The prevalence of sedentary lifestyles in Latin America is at a critical level, according to data from the World Health Organization (WHO). Brazil, at 47%, has the highest percentage of the population that's not getting enough physical activity, followed by Costa Rica at 46%, Argentina at 41% and Colombia at 36%. Ecuador, Uruguay, and Chile have lower percentages.



The bottom line: Consumer awareness of the need for physical activity has increased, but economic conditions and growing competition may test operators in the region.

Of course, Latin America isn't the only region of the world where sedentary lifestyles are common. If governments around the world do not adopt measures to promote physical activity, about 500 million people worldwide may develop heart disease, obesity, diabetes, or other non-transmissible diseases attributable to physical inactivity between 2020 and 2030. According to a 2022 report from WHO, the annual cost would be \$27 billion.

On the positive side, many Latin American gym operators agree that, now after the COVID pandemic, more consumers have come to understand the importance of physical exercise for better health and quality of life and, therefore, are seeking places to get that activity.

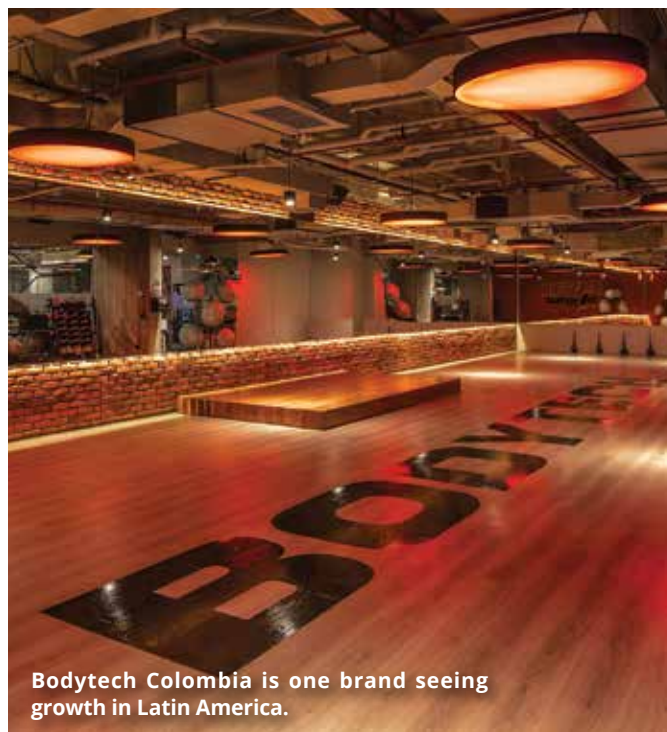
Gym owners must strike a balance between economic accessibility for users and the sustainability of their businesses.

Edgard Corona, founder of Smart Fit, the largest chain of gyms in Latin America, is one of them. "There is a consumer who is more aware of the need to practice physical activity," he says.

Gigliola Aycardi, co-founder of Bodytech Colombia, is another. "More and more people are becoming aware of the importance of taking care of their health and well-being," she says.

Health clubs and studios are well-positioned to be that resource for consumers.

"Our service is essential for the well-being of urban humans, whose bodies are in disuse most of the time," says David Mears, founder of the Multispa chain in Costa Rica. "If we continue to improve our services and communicate them well, we will positively impact the quality of life of many people."



Bodytech Colombia is one brand seeing growth in Latin America.

Positive Expectations

Due to this awakening, the sector's expectations for the rest of the year are positive.

Corona says he expects the second half of 2023 will be better than the first. Anthony Bernal from Body Shop in the Dominican Republic agrees. "We hope to end 2023 with 85% of the all-time highest number of users—which was in 2018—and 10% above in economic results as a consequence of greater efficiency," Bernal says.

Nelson Vargas, CEO of ANV in Mexico, says that his company's number of users has been growing since the beginning of the year, and he hopes this will continue. The U.S. economy is doing well, and that helps to drive Mexico's economy, Vargas says.

"Consumers have more money and can invest in our services," he says, especially as more Mexicans become aware of the need to exercise. "This has allowed us to see good numbers this year."

In Brazil, the hope is that after a proposed tax reform plan works its way through Congress, the sector will be exempted from any tax increase, says Luiz Urquiza, CEO of Bodytech Company. Brazilian operators also expect a reduction in interest rates, which, added to other structural reforms, may lead to a better investment climate and greater economic growth.

The positive numbers and outlook have led to ambitious plans for some companies. "We will consolidate our expansion plan and reach four new countries," says Guillermo Mazzoni, CEO of the Argentine chain BIGG, which already has more than 60 units.

Wilder Zapata, co-founder and CEO of Action Black, which will open its first studio in New York in October, says that he will take advantage of the boom in the sector to rapidly scale growth in 2023 and 2024.

Similarly, Station 24 in Mexico is preparing for expansion. “Before the pandemic, we had been growing organically, but now, our investors expect us to accelerate our rate of growth,” says Allan Acosta, co-founder and CEO of Station 24. “To do that, we’re working to systematize processes in all areas of the company.”

The Biggest Challenges

The World Bank predicts Latin American growth of 1.5% in 2023 and 2.4% in 2024—less than the 3.7% growth in 2022. The lower expectations are due to the decline in the price of raw materials and the more restrictive policies of central banks.

“In Latin America, the biggest problem is inflation outside the curve, which leads to an increase in interest rates, in electricity, and in the cost of living,” Corona says. “This greatly reduces the growth potential of the market and the industry. Countries stop growing, and this impacts the size of our market.”

Aycardi agrees that the biggest challenges are high inflation and sky-high interest rates.

“This can affect the affiliates’ ability to pay, and, for this reason, sales are also affected,” she says.

Inflation is beginning to slow in some countries, including Colombia, Mexico, and Brazil. However, Urquiza of Bodytech says that Brazil still is challenged by high interest rates that impact costs; low economic growth that affects income, employment, and demand; and the scarcity of long-term resources for investment. On top of that, Brazil’s Congress is expected to vote soon on proposed tax reform for a country with some of the most complicated tax rules in the world. How this will impact health clubs is yet unknown.

Increased Competition

What’s more, the last two years of growth in the region has encouraged the entry of new players, increasing competition.

“The post-pandemic era has brought a lot of competition: outdoor exercise, personalized training at home, and the proliferation of small centers,” Bernal says. “And this is even more accentuated in urban areas where high traffic makes it difficult to move to large multi-service fitness centers like ours.”

Zapata says that the addition of new clubs, and the expansion of existing clubs, can end up “cannibalizing or at least make the sector more aggressive.” This growth also means expansion in the variety of fitness concepts that are available.

“This makes the consumer more knowledgeable about the services we provide, which forces us to keep our instructors trained so they can provide good service that responds to increasingly demanding customers,” Vargas says.

Increased competition also means the industry must professionalize, Acosta says. “As the offer grows, the margins will tighten more and more,

and it will be essential to have highly professional management. It may be necessary to bring in good managers from more advanced industries,” he says.

The Role of Technology

Technology will also play a central role in the industry moving forward.

“Technology is a great ally, but I am concerned that some places are not adapting fast enough to the digital age,” Aycardi says. “I believe that applications and online services could make a difference in the way people engage with fitness.”

Mazzoni says the most important industry challenge is to adapt to different technological advances, using them as enhancers of social ties between users. “People want and use more technology, but at the same time, they want more high-quality human relationships,” he says.

Technology can help gyms improve the member onboarding process and their training experience without depending solely on trainers, according to Felipe Apablaza, founder and CEO of DMOOV Fitness Clubs and co-founder of HANU Fit in Chile. “The sector is experiencing a brain drain, and technology can help prevent this phenomenon from also becoming a customer drain,” he says.

Gyms no longer are spaces with machines where everyone does the exercises they can or that the trainer told them to do, he adds. “It is necessary to prioritize the experience of an individual who is just beginning and differentiate them from an older one,” Apablaza says. “Technology allows us to respond quickly to their queries and show them their progress.”

Along the same lines, Acosta says, “Betting on new technologies, such as machine learning and artificial intelligence, to collect and analyze data will help us focus on the users and make better decisions. Today, the company must be consumer-centric with all its processes to give better answers to our clients’ needs.”

mercadofitness.com



Colombia brand Action Black will soon expand to the U.S. and Spain.

Mexico

BY JORGE ROSALES, DIRECTOR OF MARKETING AND COMMUNICATIONS, MAS (MANAGEMENT AROUND SPORTS)

In Mexico, interest in physical activity and fitness has grown in recent years, according to a 2022 study by the Module of Sports Practice and Physical Exercise (MOPRADEF) of the National Institute of Statistics and Geography (INEGI).

In urban areas, 42.1% of the population aged 18 and older reported engaging in some form of sport or physical exercise, such as soccer, basketball, aerobics, cycling, or walking. Among the people in this physically active population, 55% followed the recommended level (time and intensity) to improve their health. However, the same study found that three out of five adults in Mexico do not engage in regular physical activity, showing that more work is needed to engage more people in exercise.

A Willing Population With Challenges

Health and physical appearance have become a priority for Mexicans. A 2023 online survey by YouGov Global Profiles found that 71.2% of the population aspires to be healthy and fit. However, this pursuit of well-being sharply contrasts with the statistics regarding sedentary lifestyles and obesity plaguing the country.

In the first half of 2021, 113,899 people died from heart diseases, and 74,418 died from diabetes mellitus, according to INEGI. In addition, respiratory infections, hypertension, and obesity rank among the eight most common diseases in Mexico. These figures are alarming and imply severe health complications for the population in the near future.

Clearly, sedentary behavior and obesity have become a public health challenge in Mexico, prompting the government to implement various programs, such as the National Physical Activation Program, an initiative aimed at promoting physical

activity by creating sports facilities, encouraging physical activity in schools and communities, and raising awareness about the importance of staying active.

Another program is the National Strategy for Overweight, Obesity, and Diabetes Prevention and Control, which seeks to address the obesity issue, and promote healthy lifestyle habits, including regular physical activity.

Economic Issues Also Play a Role

From an economic standpoint, Mexico, like other countries, has faced inflation issues. In May 2023, inflation reached 5.84% annually, forcing many Mexicans to adjust their spending.

Inflation has affected the fitness industry, especially in increasing supply costs. Despite that, most gym operators have not adequately adjusted their membership fees for inflation, leading managers to absorb the increased costs from suppliers and inputs, Enrique Vera, CEO of SPORTIUM, recently told Mercado Fitness.

To maintain profitability and continue providing quality services, operators must re-evaluate fitness fees. Gym owners must strike a balance between economic accessibility for users and the sustainability of their businesses.

Gym owners must strike a balance between economic accessibility for users and the sustainability of their businesses.

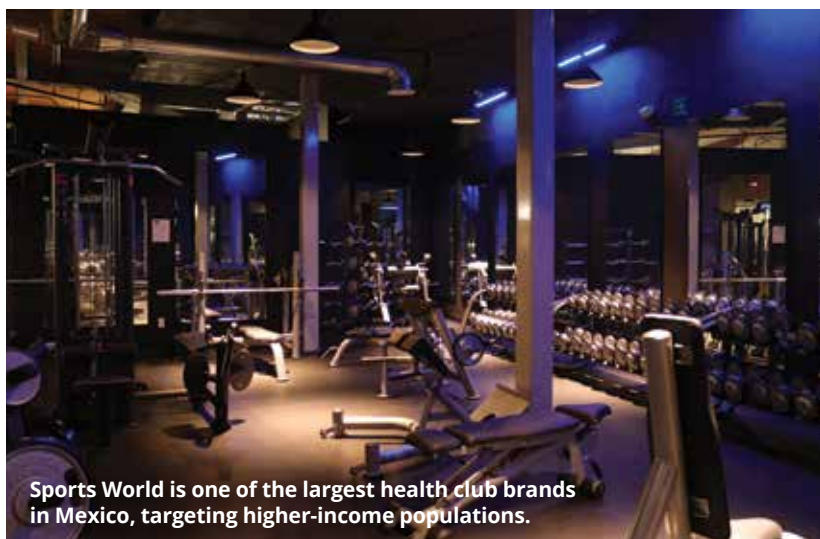
However, owners need to be sensitive to consumers. As many as 47% of Mexicans say they would give up fitness-related expenses if prices increased by 15%, according to a survey conducted by the consulting firm Capterra. This suggests that cost could be a significant barrier for many people when it comes to adopting exercise habits and leading a more active lifestyle.

This may be one reason low-price and convenience fitness chains such as Smart Fit, Energy Fitness, Station 24 Fitness, and Planet Fitness, which has recently entered some Mexican cities, are expected to grow, helping to increase physical activity participation in the coming years.

However, price is not a barrier for all Mexicans. Sport chains such as Sports World or Sport City, as well as boutiques such as Siclo or Comando, target higher-income populations in large cities.



Rosales



Sports World is one of the largest health club brands in Mexico, targeting higher-income populations.

As more people focus on their well-being, clubs in Mexico, such as Club Alpha, have an opportunity to grow.



These consumers are less price sensitive, are more interested in the latest fitness trends, are seeking an experience, or are attending to improve their social status.

The Future Looks Bright

Overall, fitness operators in Mexico have a positive outlook. Interest in weight-loss exercise programs is increasing, indicating that more people care about their well-being and want to improve their physical condition. In addition, functional training, personal training, strength training, and post-pandemic service adaptation are emerging trends, according to a study published in the Ibero-American Journal of Physical Activity and Sports Sciences.

These trends demonstrate a growing awareness of the importance of approaching exercise holistically and tailoring it

Still, the industry must address disparities in physical activity rates.

to individual needs. Still, the industry must address disparities in physical activity rates. According to data, 52% of people with higher education exercise regularly, compared to 26% of those who have completed basic education. These statistics highlight the importance of educating everyone about the benefits of exercise and making exercise more accessible for everyone.

It is essential to make a greater effort to promote physical activity and fitness nationwide, especially in states where sedentary behavior and obesity are more prevalent. To achieve this, the fitness industry must collaborate with governments to develop a strategic plan.

masenweb.com

Middle East

BY AHMAR AZAM, CEO, TRIFIT

The entire Middle East's Gulf Cooperation Council (GCC) region witnessed an unprecedented surge in economic prosperity, particularly during 2022 and 2023. This upswing marked a significant departure from its previous status as an oil and gas economy; the region is transforming into a bustling economic nucleus, with an emphasis on health and well-being a pivotal area of focus. This transformative shift was particularly evident over the preceding half decade.



Azam

Saudi Arabia, in particular, embarked on a transformative journey with its Vision 2030 initiative, striving to elevate the nation's physical activity rate to an ambitious 40%, a noteworthy feat considering the current gym penetration rate is still below 5%. To solidify this goal, the government has taken robust measures, including the establishment of a dedicated Quality of Life Ministry and a distinct entity named Sports for All. In Saudi Arabia, the elite gym category continues to present the biggest opportunity for growth. Leejam, Armah, Arena, Core, and EVOX are some of the brands leading the way.

Low-cost gyms and concept studios are mushrooming, too, but the jury is still out on the long-term success of these business models. Major challenges are parking restrictions and high rentals—particularly in big cities. For international fitness chains to thrive, the localization of Western fitness paradigms remains pivotal, considering the discerning nature of the local populace across various economic strata. The locals are highly quality-conscious. Exercisers in this region have a preference for strength training over cardio exercise. Participation in fitness classes, especially among females, is gaining momentum, and the popularity of personal training is also growing.

Another interesting virgin market for fitness in the region is Pakistan, a country that is similar in ideologies with its Middle Eastern neighbors but is different in many ways. Despite being a nation grappling with political upheaval, approximately 22 million individuals—10% of the population—possess the means to lead lifestyles akin to their Western counterparts. They are developing awareness of living a healthier lifestyle. Fitness culture in Pakistan is still in its nascent stages, yet there is a rapid expansion of fitness awareness, exemplified by trailblazers such as Shapes and TriFit. Shapes, a local fitness chain with a 25-year legacy, now has 10 branches, while TriFit has emerged as a transformative force, on track to amass the highest membership count within a year of inception.

Pakistan is experiencing similar challenges to those in other areas of the Middle East, but its challenges are compounded by a less favorable ease of doing business and limited government support. The private sector is the primary catalyst propelling the growth in the fitness industry, a pattern consistent with the broader economic landscape of the nation.

trifitclubs.com

New Zealand

BY RICHARD BEDDIE, CEO, EXERCISE NEW ZEALAND

Overall, the New Zealand exercise industry has recovered well from the challenges of the pandemic. Although only a handful of exercise providers closed in the last three years, many more have been impacted and are still recovering. As outlined below, these effects are highly variable.

New Zealand has over 1,000 exercise facilities with around 13-15% of the population—about 500,000 New Zealanders or Kiwis—counted as members and another 250,000 people using facilities in some other way.

The labor market is very tight at present; the number of trainers employed at gyms returned to pre-pandemic levels just this year. Unemployment remains low, while inflation remains historically high, creating an unusual set of challenges that have resulted in significant wage pressures.

Direct surveying of New Zealand exercise providers shows that visits, new membership sales, and revenue are all tracking above 2019 levels. However, there is still significant variation among clubs and studios. Some providers are tracking member visits of more than 30% above 2019 levels, while others are seeing member visits 30% less than 2019. The work-from-home trend and whether that continues will likely play an ongoing role in whether certain facilities return to or improve over 2019 visit and membership sales numbers moving forward.

New Zealand moved into an economic recession in early 2023. However, this is more of a known challenge—and the industry has shown itself to be resilient when faced with minor-to-moderate economic downturns. We expect this to affect personal trainers more than exercise facilities. The recession is projected to be short-lived (under 18 months).

Consumer research reinforces these industry metrics, showing that the willingness of consumers to join—or stay at—exercise providers remains high. One major change is the reasons that consumers start to exercise or continue to do so. Consumers have moved away from body transformation goals—such as weight loss and physical appearance—toward a more health-based incentive. Today, the number-one goal is to stay healthy (68%), and the number-two goal is to exercise for mental health (63%). By contrast, mental health as a motivation to exercise was noted by only 9% of respondents in 2019.

With 2023 being an election year for New Zealand, our key advocacy efforts are focused on working with both major political parties to ensure that they understand the importance of exercise, especially as it relates to lowering overall healthcare costs. Our long-term goal is to seek a significant government investment into our industry.

Looking forward to 2024, we expect the economic downturn to have passed and the labor market to have softened, along with a continued high consumer awareness of the benefits of exercise.

exercise.org.nz



Beddie

Poland

TOMASZ NAPIÓRKOWSKI, FOUNDER AND CEO, POLSKA FEDERACJA FITNESS

In the Polish fitness market, two publicly listed companies, Benefit Systems and Medicovert Sport, are the largest club operators, each with more than 100 clubs in operation.

Both companies, which not only operate fitness clubs but also act as intermediaries in the market, grew their club network significantly during the past year, especially through mergers and acquisitions.

Next to other leading players, including Xtreme Fitness Gyms, Calypso, and CityFit, there are a number of other intermediaries, such as Fit Profit and PZU Sport, as well as micro operators, such as 36minute.pl, that are active in the Polish market.

As with many other European countries, the Polish fitness market recovered in 2022, in terms of the number of clubs, members, and revenue. However, membership is expected to remain below pre-COVID levels for the time being.

Clubs in Poland were open and free to operate throughout 2022, and higher membership fees further accelerated revenue growth. Market experts expect these positive developments to continue in the coming year. New market participants such as RMG GYM, which does not allow intermediary access, entered the market. Experts also anticipate further market consolidation.

Furthermore, Polish fitness enthusiasts who work out at least once per week plan to use at-home fitness more often (+4 percentage points) than they said they would in last year's survey. With a total of 78% home use, Poland is ranked second behind Hungary in home workouts. The use of outdoor fitness and fitness clubs, on the other hand, grew less strong with +2 percentage points.

As of now, 2023 has been the best year in our industry since 2014, in terms of total revenue, which was increased by inflation and the economic situation, but also in terms of new members. The data shows that, for the first time since 2014, we have a huge increase of first-time gym users joining clubs. Also, the average age of our members dropped, meaning younger people are starting their fitness club journeys much earlier than in the past.

One of the biggest challenges is staffing. Each year, it is harder to hire an employee for basic roles, such as receptionist, customer service, or cleaning services. As a country, Poland has increased the minimum wage/minimum salary by almost 150% during the last few years, which was too fast for the economy and the fitness industry.

As the Polish Fitness Federation, we have organized the Polish Fitness Summit in 2022, and we have created a Polish Market Report in cooperation with Polish software companies, such as eFitness.

polskafederacjafitness.pl



Napiórkowski

Portugal

BY ANA COELHO DÂMASO, VICE PRESIDENT,
PORTUGAL ACTIVO

Portugal's economy is the 49th largest in the world with a GDP of about €211.3 billion in 2021, growing by 4.9% after the economic crisis caused by the COVID pandemic in 2020. The Portuguese economy was expected to grow by 5.8% in 2022 and 2.7% in 2023, according to the European Commission, which highlights that Portugal has a "different recovery trajectory" than other countries.



Dâmaso

Portugal recorded the highest economic growth in the last decade in the second quarter of 2021 with a GDP increase of 16.3% compared to the same period of 2020 and 4.9% compared to the previous quarter.

The main drivers of the economic recovery are the resumption of domestic and external demand, support measures put in place by government for businesses and households, and the implementation of the Recovery and Resilience Plan.

Portugal is still impacted by inflation, as are other economies. According to the latest data from the Instituto Nacional de Estatística (INE), the inflation rate in Portugal was 9.6% in December 2022, down from 10.1% in November 2022. The average annual inflation rate in 2022 was 7.8%, the highest since 1992.

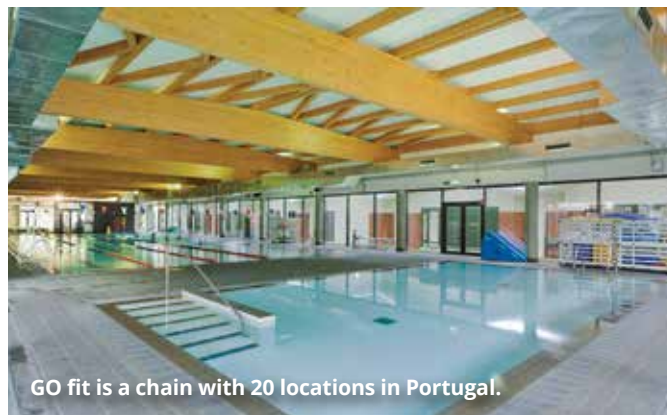
The governor of the Bank of Portugal has said that the peak of inflation and interest rates has passed and that 2023 will be a year of normalization.

Portugal's high inflation stemmed from effects of the pandemic, an increase in energy prices, supply chain disruptions, and global demand.

The governor of the Bank of Portugal has said that the peak of inflation and interest rates has passed and that 2023 will be a year of normalization.

The Status of Clubs and Studios

Health clubs in Portugal have returned to activity levels similar to those of 2019, but that return has not been fully reflected in



GO fit is a chain with 20 locations in Portugal.

club revenues, according to "The Barometer of Fitness Autónoma Portugal Activo 2022," which is the last annual report that presents the results of a study conducted in a partnership between Portugal Activo and the Universidade Autónoma de Lisboa.

Fitness club revenue in Portugal approached €230 million in 2022 for a total of 880 clubs with more than 691,000 members and a market penetration rate of 6.7%. The member profile remains mostly the same: 54% of members are women who visit the club almost twice per week, and the number of members aged 65 and older has increased 5%.

The low-price club sector is experiencing growth. In 2024, low-price chains such as Element (SC Fitness), Fitness UP, and the franchising group Fitness Factory as well as international chains such as Smart Fit plan to open about 100 new clubs outside big cities.

Advocacy Efforts

Portugal Activo, the association representing public and private stakeholders in the sector, is committed to improving the health and well-being of the Portuguese population by promoting physical activity and combating sedentary behavior. One of the main challenges for Portugal is the lack of awareness and education about the benefits of physical activity.

To remedy that, Portugal Activo has presented to the government a set of comprehensive measures for inclusion in the 2024 state budget. These measures would help implement awareness and health education campaigns that highlight the benefits of physical activity in disease prevention and overall well-being, and they would encourage the population to adopt an active and healthy lifestyle.

The measures include the following:

- **+Active Company and +Active Municipality Award.** The association has proposed the implementation of a +Active Company and +Active Municipality Award, which will recognize and reward companies and municipalities that excel in promoting physical activity among their employees and local communities. This initiative would provide visibility through the media, encouraging other entities to adopt similar measures.

- **+Active Voucher.** Portugal Activo suggests the creation of the +Active Voucher, a benefit that companies could offer to

their employees. This voucher would be tax-exempt (IRS and TSU) and could be used to pay for gym services in companies meeting the national code for economic activities, CAE 93,130, making physical activity more accessible to workers.

■ **Tax incentive.** The association proposes allowing the cost of physical activity to be taken as a tax deduction, similar to expenses related to healthcare and education. This measure would incentivize citizens to invest in regular physical activities, promoting health and well-being.

With the implementation of these measures, Portugal Active aims to increase the number of people engaged in physical activity, improve the health of the population, and boost national productivity.

■ **A gym in every school.** To promote regular exercise from childhood to adulthood, Portugal Activo proposes the development of fitness activities in schools during physical education, civic education, or after-school hours. This measure aims to instill healthy habits from a young age.

With the implementation of these measures, Portugal Activo aims to increase the number of people engaged in physical activity, improve the health of the population, and boost national productivity. In addition, the government could save an estimated €61.5 million in healthcare costs and increase revenue by about €147.5 million, resulting in an estimated benefit of approximately €209 million in the annual state budget, according to the joint study done with Universidade Autónoma.

For Portugal Activo, investing in the promotion of physical activity is essential for a healthier and more prosperous country. We hope these measures are considered and implemented in the 2024 state budget, strengthening our commitment to the health and well-being of the Portuguese population.

Portugal Activo reaffirms its commitment to collaborate with government entities, the private sector, and civil society to implement effective solutions that promote physical activity and combat sedentary behavior throughout the country.

portugalactivo.pt

Romania

BY KENT ORRGREN, PRESIDENT, ROMANIA ACTIVE

In 2021, we started Romania Active with a group of the leading health and fitness companies in Romania, which came together with the goal of supporting the future of the industry and influencing legislative changes in the sector. It marked the beginning of a unified voice for the health and fitness industry that could be a strong advocate for the recognition of health clubs and gyms as essential components of the nation's health and well-being.



To make change possible, Romania Active started a campaign to educate key stakeholders, including policymakers and state officials, about the importance of physical exercise for the health of the nation, and ultimately, for the health of the entire Romanian economy.

A Highly Coveted Breakthrough

This year, we scored a huge win: A new law has made all gym and health club subscriptions tax-free and tax deductible up to the value of €400. Now, companies can offer gym memberships and other fitness subscriptions as tax-free and deductible non-wage benefits.

The tax exemptions also cover companies offering "mixed preventative care," which covers specific physical activity and medical subscriptions relating to recovery and recuperation. In addition, tax-free subscriptions can be offered to children of employees or other persons in their care.

Romania Active started a campaign to educate key stakeholders, including policymakers and state officials, about the importance of physical exercise for the health of the nation.

Three Keys to Success

By joining forces and capitalizing on our collective know-how and expertise, we sent a strong message demonstrating that fitness and wellness membership deductibility would encourage more Romanians to adopt healthier lifestyles. In

our meetings with authorities prior to the deductibility law, we emphasized the preventive healthcare benefits that this law would bring about—and the cost savings for the health-care system.

I am honored to be part of Romania Active, as president of the association. Being among the initiators of the fitness membership deductibility law demonstrates our association's positive influence for the entire health and fitness industry, the power of the change, and the impact that we generate not only at an individual level but also for the entire nation.

Being among the initiators of the fitness membership deductibility law demonstrates our association's positive influence for the entire health and fitness industry...

The fitness and wellness membership deductibility law is still a desideratum in many countries of the world. In fact, Romania is now one of the few countries globally that benefits from such a law. The success of Romania Active can certainly offer valuable insights to other nations.

Here are some of our key strengths:

- **We highlight important research.** It is extremely important to gain the government's recognition of the importance of physical exercise for the well-being of the population and the entire economy. We did that by showing results of studies and research.
- **We're unified.** Bringing together leading industry players under the roof of Romania Active has amplified the impact of our voices and our initiatives.
- **We work with other experts.** Romania Active's collaborative culture demonstrated professionalism and convinced others. We brought together experts from various fields to provide analyses that demonstrated the advantages of the deductibility law for individuals, for society, for the fitness industry, and for the entire economy.

romaniaactive.ro

Spain

BY MARÍA ANGELES DE SANTIAGO RESTOY, OWNER, MAS (MANAGEMENT AROUND SPORTS)



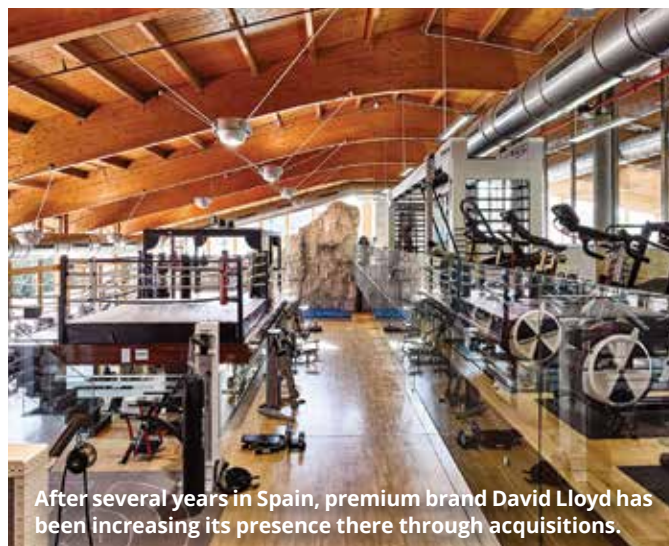
Angeles de Santiago

Despite political uncertainty making investors cautious, the Spanish economy is showing positive signs that could bode well for the fitness market there. In Spain, 2023 is an election year, and due to the country's parliamentary system, the political parties are negotiating and forming coalitions to govern. Changes in regional governments and mid-year general elections have not tilted the balance of power in any direction, causing uncertainty, not just about the country's political direction but also its fiscal and legal security.

All of these factors can make investors wary. In fact, inflation and the looming shadow of a possible recession caused a slowdown that has the Spanish business sector approaching the near future with caution.

However, Spain has one of the lowest inflation rates within the Eurozone, ending 2022 with a rate of 5.7% and the year-on-year data in June 2023 being 2.3%. Spain's data on GDP and unemployment also are skewing positive. The country has had a year-on-year increase of 5.5% (2022 vs. 2021) in GDP, according to the National Institute of Statistics, and the unemployment rate has decreased to pre-pandemic levels, reaching 11.6% with 21 million people employed.

One factor that could increase growth for the health and wellness industry is political discussions about the convenience of prescribing and subsidizing sports activities. Some of the political parties are proposing the creation of a national strategy to promote sports to battle sedentary lifestyles and physical inactivity. In addition, the National Federation of Sports Centers in Spain (FNEID) is seeking a reduction in the value-added tax (VAT) for sports centers that was increased almost a decade ago.



After several years in Spain, premium brand David Lloyd has been increasing its presence there through acquisitions.

Growth Trends

The Spanish club and studio market has undoubtedly experienced a return to normalcy. In most cases, more than 90% of the sector is already back to pre-pandemic revenue levels. However, the number of users has not increased to the same extent, and significant changes have occurred in age demographics within facilities.

The low-priced business model has grown with significant mergers anticipated. Additionally, the low-priced model is about to undergo changes with latent inorganic growth that will likely materialize in the coming months.

The premium model had a strong entry with David Lloyd, a player that has been present in Spain for many years, who expanded its holdings in 2023 through acquisitions in major Spanish cities, including the purchase of Reebok Sports Club and its two premium centers in La Finca and Serrano, as well as the acquisition of the premium assets of Accura.

Boutiques have also expanded in the number of units per brand, especially Distrito Estudio, Brooklyn Fitboxing, and Yoga One. In addition, new operators have opened with innovative concepts in 2023. This is in addition to already established brands, including BFT and BIGG, who have entered the international market here.

Consumers in Spain now have many fitness options with a wide variation in prices, though without a significant difference in terms of services offered. Prices have increased on average by 8% in centers that have raised prices, but the disparity in services is not as noticeable. Users in low-priced centers have a relatively similar experience to those in mid-priced facilities.

Challenges and Opportunities

Today's Spanish club operators must implement cost control, understand customers, and provide those consumers with what they need. To do so, an increasing number of Spanish chains are using data analysis and artificial intelligence to interact with customers and personalize services to improve member loyalty rates.

Sports participation has increased not only in specialized centers but also through influencers, which is attracting a younger demographic of Spanish sports enthusiasts. These new customers are, in some cases, replacing former members who left during the pandemic and never returned.

Spanish operators must now determine whether they need to change their product to adapt to these new trends. That means finding incentives to recapture all those who left during the pandemic and have yet to return. Operators also need to attract an older audience by offering services that truly meet their needs.

"The Spanish market will undergo operator consolidation and price increases in the coming years," predicts Manel Martinez, business support director in Spain for David Lloyd. "It will continue to grow but at a slower pace than in previous years. Technology and sustainability are two challenges that must be addressed immediately."

[masenweb.com](https://www.masenweb.com)

United Kingdom

BY DAVID MINTON, FOUNDER, LEISURE DB

One word sums up the UK fitness industry: resilience. This is against a higher than usual inflation rate in July 2023 of 6.8%, which is down from a peak of 11.8% in January 2023. Energy costs are also declining, as monthly prices fell by 25% between June and July.

Brexit, in which the United Kingdom left the European Union, has caused some additional administrative burdens, higher costs, and slower response from suppliers. A large portion of the city center workforce has maintained a hybrid working arrangement, especially affecting London, which had the highest concentration of gym sites. Brands such as Fitness First and GymBox have closed some sites in London.

My company's annual audit of the UK leisure industry found that just over 7,000 sites with fitness facilities—available on a membership or pay-and-play basis—remain.

Despite any concerns these challenges may raise, speaker after speaker at IHRSA 2023 in March said that COVID, inflation, and higher energy costs will, in the long term, have a positive impact on the industry. This positive outlook is reflected in the UK in 2023: We have fewer sites (down 0.9%) but more members (up 3.9%), plus we have a cumulative increase in monthly fees that has increased the value of the industry to the highest market value we have ever seen (up 11.5%). Our penetration rate is 15.1%—not quite back to pre-COVID levels but expected to be closer to 16% in 2024.

A Move to Premium

Across the whole industry, a premiumization is taking place in every sector. Low-price brands are moving into the mid-market, mid-market brands are moving into premium, and we see a growth of what I call a new super-premium category. All of this confirms the sector's long-term resilience.



BXR City in London is a premium brand with this location on the 25th floor of commercial development 22Bishopsgate.

The database from our annual audits—with its many years of trend data that we can review by each site, brand, price, and range of facilities—provides the most accurate, granular view of the supply-side. From this unique dataset, we see a reduced number of low-price brands—those who charge below £25 per month—for the first time since 2012. Some so-called mid-market brands have added value with boutique-style classes, massage chairs, and EMS, while raising their monthly prices.

The premium market—£75-£150 per month—has realized that the link between health and wellness is here to stay. The rise of the “health is the new wealth” consumer is driving higher spending. The fastest growth sector is the super-premium sector, now with almost 100 sites, that charge between £150 and £600 per month. These sites are aspirational with promises to fuel growth and promote individual well-being. Many encompass new technology that enables long overdue measurement that in future reports will enable us to weave achievements of members and the wider community into our annual review.

Achievements

The UK has a strong public sector, and it has the largest growth potential. Currently, one in 21 people are members of a public gym, a 4.9% penetration rate, which is a 28% increase in members over the previous year. The value of this sector has grown by 32%.

Potential links to the National Health Service and offering a range of “health” services is growing. For example, the Prehab4Cancer service in Greater Manchester has grown from humble beginnings to supporting 10,000 cancer patients in their battles.

During COVID, the sports and fitness sectors failed to convince the government to offer significant support to the industry. In the end, the Sport Recovery Fund received £190 million, compared to £1.5 billion for the Arts and Culture Funds, and fitness received no support.

But that blow was the biggest defining moment for the industry in the past 20 years. The lack of support was due to a lack of data, which the industry is set to resolve. We’re entering a new era of results-driven funding and a drive towards leveling up, which is essential if our advocacy efforts are to succeed.

UK operators and suppliers are working together as a community to achieve the shared goal of a more active and healthy future for all of us. A series of events such as Evolve (details on our website below) and follow-up roundtables are catalysts stirring emotions and increasing the conversation about how we can grow the sector. My company’s Leisure Database will continue to collect data, so we can prove the impact our sector has on improving the health of the nation.

For those interested in the UK fitness industry, Leisure DB has for the first time produced a Spotlight Report, which is available free of charge at leisuredb.com/publications along with the full report and other publications. You can gain further insight into the UK market by visiting our blog at leisuredb.com/blog.

leisuredb.com

United States

BY RICK CARO, PRESIDENT, MANAGEMENT VISION

We all recognize the devastation that the COVID pandemic did to the overall U.S. health and fitness industry by forcing some facilities to close temporarily. Exactly 25% of all facilities closed permanently. Since the reopenings by individual states—much later on the two coasts—the industry has been on a comeback trajectory.



The barometer the financial world uses is 2019. For the U.S. industry, the story is still not yet one of full return. Clearly, the usage patterns have been steadily increasing and, in some cases, are now seeing participation levels even higher than 2019. But overall memberships and total revenue are not back yet. In fact, January 2023 membership numbers were 10% lower than in January 2022, according to IHRSA research estimates calculated at the beginning of 2023.

Challenges for Club Operating Financials

That said, 2023 is seeing a continuing buildup of revenue levels, due to a combination of increasing new joins and better-than-average retention levels. The challenge for many club categories, especially multi-sport clubs, is that non-dues revenue categories are decidedly less than pre-COVID. This is led by much lower personal training revenue and somewhat less revenue in the food and beverage and spa amenity areas.

2023 is seeing a continuous buildup of revenue levels, due to a combination of increasing new joins and better-than-average retention levels.

Obviously, this impacts EBITDA levels. Because club owners re-engineered their operations post-COVID, many are now seeing improvements in their bottom lines. However, many clubs in a variety of sectors are still struggling to reach their 2019 bottom lines.

The U.S. economy has added to these fiscal pressures with inflationary pressures, increasing interest rates, and the possible threat of a recession. This has led clubs to rework their debt and equity structures and try to redevelop a more favorable balance sheet.

New Builds and Openings

In addition, the industry has not been growing its store openings as fast as in the past. This is a function of the lack of adequate new-build capital and the cost of a new facility. Obviously, interest rates are continuing to rise, the cost of new construction may reach a 25% higher level, and the landlord's tenant-improvement allowance is often much less than in the past. Also, there were supply chain issues, especially with previous HVAC delays. A few franchisees are opening eight to 10 clubs or more a year, but this is rare. In some cases, they have switched their growth mode to an occasional acquisition.

Also, this has led to a lesser annual reinvestment in the current physical plant and equipment. This will put pressure on clubs to "catch up" in this direction and may force potential buyers in the future to create offsets of a purchase price to compensate. This will be a pressure point on club operators who are regularly challenged by the need to upgrade their technology among other pressures.

The Current State of Financial Firms

Fortunately, the health club industry continues to attract private-equity firms and has for more than 35 years. They have taken positions with high-end club companies, HV/LP, and HVLP 2.0 companies, studios, and franchisors, as well as substantial franchisees. Currently, most are trying to grow their companies but often at a slower pace than previously. With fewer acquisitions and pricey debt costs, most are staying the course in 2023. Several are already preparing for a capital event in 2024.

Fortunately, the health club industry continues to attract private-equity firms and has for more than 35 years.

This is an industry with few publicly traded companies and only a limited number are performing well. In particular, the markets are favorable to the franchised model, which are capital light, and markets like its growth, leverage, and easy-to-replicate model.

During this time, little consolidation is likely, and few acquisitions are expected. With no national broker nor proper valuation standards, few transactions occur. Many of the major club companies have elected to grow by new builds instead. Rarely does the U. S. see international companies expand here. For years, many people expected that companies in analogous industries (e.g., hotels, athletic manufacturers, entertainment, etc.) would enter the U.S. club market. Only recently has Nike announced an early attempt to create Nike Studios.

Luxury brand Life Time is one of the few publicly traded health club brands in the U.S.



The At-Home Market

The at-home market developed during COVID, as many consumers purchased residential-level equipment, downloaded fitness apps, and developed outdoor exercise routines. As COVID ended, many returned to their brick-and-mortar facilities.

However, the hybrid work environment has directly affected club membership levels and usage patterns. Some consumers are returning to club membership if they regularly work in the office three days or more per week. However, many now have fashioned a combination of workouts involving clubs or studios, and at-home. This trend is evolving and likely won't be fully predictable until early 2024.

Changing Influences

Healthcare and insurance companies are increasingly trying to influence adults, especially older adults, to register for packaged fitness programs. A new question mark has arisen as expensive medical treatments (mainly aimed at diabetics) are attracting some overweight adults to pay high, non-reimbursable fees for semaglutide injections for weight loss. These treatments are early in the rollout with some long-term side effects occurring.

The Millennials and Gen Zers are potential game-changers for the industry as they experience club usage. Gen Alpha (teens) is also a future opportunity.

Technology is a wild card, as new apps are being created (e.g., wearables, mobile apps, online content, online paying, and other new categories). Data is being collected, but the challenge for clubs is to make it usable.

If IHRSA's advocacy efforts succeed and federal legislation is passed to create vehicles for new joiners using their Health Savings Accounts or Flexible Spending Accounts, it could be a game-changer for the U.S. health and fitness industry.

Conclusions

It has become clear that 2023 will be a transition for the U.S. It is not expected to be a consistent year, but it should be superior to 2019. In 2024, we can expect to see a more understandable and predictive set of behavior patterns (e.g., new joins, cancels, usage, spending levels, etc.) and overall industry growth. The financial industry is optimistic about the future of the U.S. health and fitness industry.

ihrsa.org



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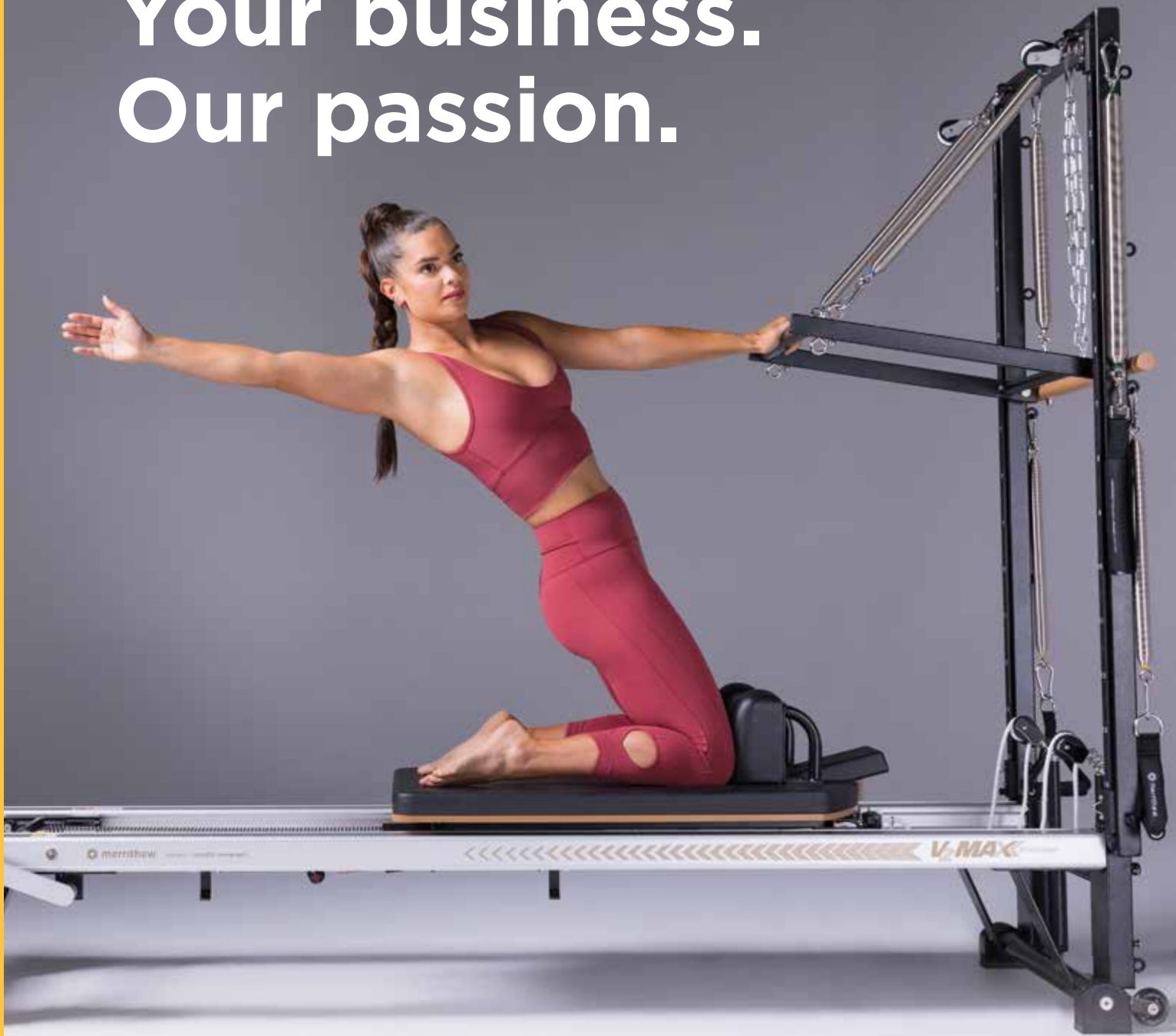
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LEADING HEALTH CLUB AND STUDIO COMPANIES

This section provides information about many of the world's leading health clubs and studios. The figures reported were obtained either from the companies themselves or from public, published sources. Unless otherwise noted, the number of locations includes all facilities owned, managed, licensed, and/or franchised. Revenue values are in U.S. dollars. None of the figures have been independently audited or corroborated by IHRSA.



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Roger Martin
CEO, RockBox Fitness

See how ClubReady helps give clubs and gyms like RockBox Fitness the horsepower they need to scale their operations.



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ASIA-PACIFIC

24/7 FITNESS

www.247.fitness

Corporate Headquarters:
Hong Kong

Number of Clubs:
2022: 80+ (franchised)



CEO: Ingrid Wong

Markets Served:
Asia-Pacific

ABSOLUTE STUDIO

www.absoluteboutiquefitness.com

Corporate Headquarters:
Bangkok, Thailand

Year Founded: 2002

Number of Clubs:
2022: 12 (owned)

Number of Employees:
2022: 220

Principal & CEO: Benjaporn Karoonkornsakul

Markets Served: Asia-Pacific

BALLARAT GENESIS BODY&SOUL, AUSTRALIA

www.ballaratfitness.com

Corporate Headquarters:
Ballarat, Victoria, Australia

Year Founded: 2003

Number of Clubs:
2022: 1 (owned)

Number of Members:
2022: 2,500

Number of Employees:
2022: 25

Principal & CEO:
Mel Tempest

Markets Served:
Asia-Pacific

CENTRAL SPORTS CO., LTD.

www.central.co.jp

Corporate Headquarters:
Tokyo, Japan

Number of Clubs:
2023: 243 (combination of owned and managed)

Principal: Publicly Traded (TYO: 4801)



CEO: Mr. Seiji Goto

Markets Served:
Asia-Pacific

CHRISTCHURCH CITY COUNCIL

ccc.govt.nz

Corporate Headquarters:
Christchurch, Canterbury, New Zealand

Year Founded:

Number of Clubs:
2022: 4 (owned)

Number of Members:
2022: 5,866

Number of Employees:
2022: 120

Principal: Christchurch City Council Holdings Limited

CEO: Dawn Baxendale

Markets Served:
Asia-Pacific

COLLECTIVE WELLNESS GROUP

Parent Company
www.collectivewellness.com.au

Anytime Fitness Australia
<https://www.anytimefitness.com.au>

XTEND
www.xtend.com.au

SUMHIIT Fitness
www.sumhiit.com

Corporate Headquarters:
Australia

Number of Clubs:
2022: 560+

Number of Members:
2022: 600,000+

Principals: Justin McDonnell and Richard Peil

CEO: Nicole Noye

Markets Served:
Asia-Pacific

CULT.FIT

Parent Company
<https://www.cult.fit>

Gold's Gym India
www.goldsgym.in

Fitness First India
www.fitnessfirst.net.in

Corporate Headquarters:
India

CEO: Mukesh Bansal

Number of Clubs:
2022: 250+*

Markets Served:
Asia-Pacific

**Excludes health and fitness businesses that are a part of the cultpass network.*

CURVES HOLDINGS CO., LTD.*

<https://www.curvesholdings.co.jp>

Corporate Headquarters:
Tokyo, Japan

Number of Clubs:
2022: 1,954 (76 owned, 1,878 franchised)

Number of Members:
2022: 787,000

Principal: Publicly Traded (TYO: 7085)

CEO: Takeshi Masumoto

Markets Served:
Asia-Pacific

**Club and member count are as of 30 November 2022.*

CW GROUP

www.physicalclub.com

Corporate Headquarters:
Shenzhen, Guangdong, China

Year Founded: 1995

Number of Clubs:
2022: 18 (owned)

Number of Members:
2022: 120,000



Principal & CEO: Loni Wang

Markets Served:
Asia-Pacific

EVOLUTION WELLNESS HOLDINGS

Parent Company
www.evolutionwellness.com

Celebrity Fitness
www.celebrityfitness.com.my

CHI Fitness
www.chi-fitness.com

FIRE
www.firestation.fit

Fitness First
www.fitnessfirst.asia

Fivelements
www.fivelements.com

GoFit
www.gofit-gym.com/my

Corporate Headquarters:
Malaysia

Number of Clubs:
2022: 170+

Principal: Navis Capital Partners



CEO: Simon Flint

Markets Served: Asia-Pacific

FAST FITNESS JAPAN

fastfitnessjapan.jp

Corporate Headquarters:
Tokyo, Japan

Number of Clubs:
2022: 1,055 (171 owned,
884 franchised)

Number of Members:
2022: 710,000

Principal: Publicly Traded
(TYO: 7092)

CEO: Kiyoaki Yamabe

Markets Served:
Asia-Pacific

FITNESS24SEVEN (THAILAND)

th.fitness24seven.com

Corporate Headquarters:
Thailand

Number of Clubs:
2022: 6

Principal: Vedere
Gastione, LLC



Managing Director:
Bryan O'Rourke

Markets Served:
Asia-Pacific

FITNESS & LIFESTYLE GROUP (FLG)

Parent company
www.fitlg.com

Barry's Bootcamp (AU & SG)
www.barrysbootcamp.com.au

California Fitness & Yoga
www.cfyc.com.vn

Fitness First (Australia)
www.fitnessfirst.com.au

Goodlife Health Clubs
www.goodlifehealthclubs.com.au

Jetts
www.jetts.co.nz
www.jetts.co.th

Zap Fitness
www.zapfitness.com.au

Corporate Headquarters:
Australia

Number of Clubs:
2022: 385



CEO: Greg Oliver

Markets Served: Asia-Pacific

HILEFIT

www.lefit.com

Corporate Headquarters:
Hangzhou, Zhejiang
China

Number of Clubs:
2022: 1,200+ (mainly
franchised)

CEO: Han Wei

Markets Served:
Asia-Pacific

INSPIRE BRANDS ASIA

www.inspirebrandsasia.com

Corporate Headquarters:
Singapore



Chief Support Officer,
Anytime Fitness Asia:
Andrea Bell

Number of Clubs:

2022: 300+

Markets Served:
Asia-Pacific

JOY FIT

www.joyfit.jp

Corporate Headquarters:
Japan

Number of Clubs:
2022: 220+

Markets Served:
Asia-Pacific

KONAMI SPORTS CO., LTD.

www.konami.com/sportsclub

Corporate Headquarters:
Tokyo, Japan

Number of Clubs:
2022: 360 (combination of
owned and managed)

Principal: Publicly Traded
(TYO: 9766)

President: Takeshi Murota

Markets Served:
Asia-Pacific

LAVA HOT YOGA STUDIO

www.lava-yoga-global.com

Corporate Headquarters:
Japan

Number of Clubs:
2022: 420+

Markets Served:
Asia-Pacific

LIFE COACH

www.lifecoach.co.id

Corporate Headquarters:
Jakarta, DKI Jakarta,
Indonesia

Year Founded: 1986

Number of Clubs:
2022: 15 (2 owned,
13 managed)

Number of Members:
2022: 500

Number of Employees:

2022: 60

Principal: Brian Billdt

CEO: Dhany Hajadi

Markets Served:
Asia-Pacific

RENAISSANCE INCORPORATED

www.s-renaissance.co.jp/en

Corporate Headquarters:
Tokyo, Sumida ward, Japan

Year Founded: 1982

Number of Clubs:
2022: 173 (139 owned,
23 managed, 11 franchised)

Number of Members:
2022: 373,615

Number of Employees:
2022: 3,445

Principal: Publicly Traded
(TYO: 2378)



CEO: Toshiharu Okamoto

Revenue:
2022: \$306,145,115

Markets Served:
Asia-Pacific

SUPERMONKEY

www.supermonkey.com.cn

Corporate Headquarters:
Shenzhen, Guangdong,
China

Number of Clubs:
2022: 230+

CEO: Liu Shuting

Markets Served:
Asia-Pacific

TERA WELLNESS

www.1012china.com

Corporate Headquarters:
Shanghai, China

Number of Clubs:

2022: 100+

CEO: Yuqing Jin**Markets Served:**

Asia-Pacific

UFC GYM (AUSTRALIA)www.ufcgym.com.au**Corporate Headquarters:**

Sydney, NSW, Australia

Year Founded: 2014**Number of Clubs:**

2022: 13 (4 owned & managed, 9 franchised)

Number of Members:

2022: 10,000

Principal: Ultimate Franchise Group**CEO:** Maz Hagemrad**Markets Served:**

Asia-Pacific

VIVA LEISURE GROUP**Parent company**www.vivaleisure.group**Club Lime**www.clublime.com.au**Plus Fitness**www.plus.fitness**Hiit Republic**www.hiitrepublic.com.au**GroundUp Studios**www.groundup.studio**Rebalance Pilates & Yoga**www.rebalance.studio**Corporate Headquarters:**

Canberra, ACT, Australia

Year Founded: 2004**Number of Clubs:**

2022: 338 (162 owned, 176 franchised)

Number of Members:

2022: 333,423

Number of Employees:

2022: 1,600

Principal: Publicly Traded (ASX: VVA)**CEO:** Harry Konstantinou**Revenue:**

FY 23 (July 2022 - June 2023): \$97,920,000

Markets Served:

Asia-Pacific

WHAKATANE AQUATIC AND FITNESS CENTREwww.whakatane.govt.nz/aquatic**Corporate Headquarters:**

Whakatane, Bay of Plenty, New Zealand

Year Founded: 2002**Number of Clubs:**

2022: 1

Number of Members:

2022: 600

Principal: Whakatane District Council**CEO:** Steph O'Sullivan**Markets Served:**

Asia-Pacific

WILL'S FITNESSwww.willsfitness.net**Corporate Headquarters:**

Shanghai, China

Number of Clubs:

2022: 150+

**CEO:** Will Wang**Markets Served:**

Asia-Pacific

EUROPE, MIDDLE EAST & AFRICA (EMEA)

Along with participant responses from the IHRSA Global Report survey, data from key club operators in Europe was provided by the EuropeActive / Deloitte Market Report. Sources for club data on Europe also include Management Around Sports (MAS), The Leisure Database Company, Portugal Activo, Deutscher Sportstudio Verband (DSSV), VIRKE Trening, and Benefit Systems.

360 TRÄNINGSCENTER ABwww.360tc.se**Corporate Headquarters:**

Skellefteå, Västerbotten, Sweden

Year Founded: 2009**Number of Clubs:**

2022: 4 (owned and managed)

Number of Members:

2022: 4,766

Number of Employees:

2022: 31

Principals: Annie Fältman, Patrik Nygren, and Petra Nygren**CEO:** Patrik Nygren**Revenue:**

2022: \$1,850,683

Markets Served: Europe**3T**www.3t.no**Corporate Headquarters:**

Norway

Number of Clubs:

2022: 18 (owned)

Principals: Hilde Thommesen Holck, Tor Thommesen, and Unni Thommes**CEO:** Hilde Thommesen Holck**Markets Served:** Europe**ACTIC GROUP**www.actic.se**Corporate Headquarters:**

Solna, Sweden

Number of Clubs:

2022: 152 (owned)

Number of Members:

2022: 184,000

CEO: Anna Eskhult**Revenue:**

2022: \$78,864,353

Markets Served: Europe**L'APPART FITNESS**www.lappartfitness.com**Number of clubs:** 108

(partially franchised)

CEO: David Mazerot**Markets:** Europe**BASIC-FIT**www.basic-fit.com**Corporate Headquarters:**

Hoofddorp, Netherlands

Number of Clubs:

2022: 1,200 (owned)

Number of Members:

2022: 3,352,000

Principal: Publicly Traded (AMS: BFIT)**CEO:** René Moos**Revenue:**

2022: \$835,962,145

Markets Served: Europe

BESTFIT GROUP

Parent Company:
www.bestfit-group.de

jumpers fitness:
www.jumpers-fitness.com

Ai Fitness: www.ai-fitness.de

Corporate Headquarters:
Rosenheim, Germany

Number of Clubs:
2022: 82

Number of Members:
2022: 260,000

CEO: Stefan Schulan

Revenue:
2022: \$70,452,156

Markets Served: Europe

BODY & SOUL

www.bodyandsoul.de

Corporate Headquarters:
Germany

Number of Clubs:
2022: 10 (owned)



CEO: Michael Pribil

Markets Served: Europe

BODYSTREET

www.bodystreet.com

Corporate Headquarters:
Germany

Number of Clubs:
2022: 309



Principals & CEOs: Emma & Matthias Lehner

Markets Served: Europe, North America (US & Canada), Africa

DAVID LLOYD LEISURE (DLL)

www.davidlloyd.co.uk

Corporate Headquarters:
Hatfield, United Kingdom

Number of Clubs:
2022: 130

Number of Members:
2022: 730,000

CEO: Russell Barnes

Revenue:
2022: \$786,540,484

Markets Served: Europe

EASYFITNESS

www.easyfitness.club

Corporate Headquarters:
Hanover, Germany

Year Founded:
2022: 176

Number of Clubs:
2022: 176

Number of Members:
2022: 435,000

CEO: Jens Tappe

Revenue:
2022: \$118,822,292

Markets Served: Europe

ENCORE FITNESS

www.encorefitness.ru

Corporate Headquarters:
Russia

Year Founded:
2022: 6

Number of Clubs:
2022: 6



CEO: Irina Kutina

Markets Served: Europe

FIT/ONE

www.fit-one.de

Corporate Headquarters:
Waldrunn, Germany

Number of Clubs:
2022: 36

Number of Members:
2022: 182,000

CEO: Peter Leisten

Revenue:
2022: \$51,524,711

Markets Served: Europe

FITINN

www.fitinn.at

Corporate Headquarters:
Vienna, Austria

Number of Clubs:
2022: 58

Number of Members:
2022: 240,000

CEO: Dieter Messner

Markets Served: Europe

FITNESS GROUP NORDIC AS (EVO)

www.evo.no

Corporate Headquarters:
Oslo, Oslo, Norway

Year Founded: 2009

Number of Clubs:
2022: 54 (53 owned, 1 franchised)

Number of Members:
2022: 54,535

Number of Employees:
2022: 17

Principal: Karbon Invest AS



CEO: Morten Hellevang

Revenue:
2022: \$23,133,544

Markets Served: Europe

FITNESS PARK GROUP

www.group.fitnesspark.com

Corporate Headquarters:
Paris, France

Number of Clubs:
2022: 258 (mainly franchised)

Number of Members:
2022: 835,000



Chairman:
Philippe Herbette

CEO: Gaëtan Dubiosson

Revenue:
2022: \$235,541,535

Markets Served: Europe

FITNESS24SEVEN

se.fitness24seven.com

Corporate Headquarters:
Sweden

Year Founded:
2022: 250+

Number of Clubs:
2022: 250+



Principal & CEO:
Christian Ask

Markets Served: Europe, Latin America, Asia-Pacific

FITX

www.fitx.de

Corporate Headquarters:
Essen/Monheim am Rhein, Germany

Number of Clubs:
2022: 102 (owned)

Number of Members:

2022: 842,000

CEO: Markus Vancraeynest,
Burkhard Revers

Markets Served: Europe

FORUS

www.forus.es

Corporate Headquarters:
Madrid, Spain

Year Founded:

Number of Clubs:

2022: 68

Number of Members:

2022: 327,000

CEO: Ignacio Triana Gracian

Revenue:

2022: \$107,255,521

Markets Served: Europe

FRISKIS & SVETTIS

www.friskissvettis.se

Corporate Headquarters:
Stockholm, Sweden

Year Founded:

Number of Clubs:

2022: 163 (owned)

Number of Members:

2022: 486,000

CEO: Janna Hellerup Ulvelius

Revenue:

2022: \$105,152,471

Markets Served: Europe

FRONT DE SEINE

frontdeseine.net

Corporate Headquarters:
Paris, Ile de France, France

Year Founded: 1977

Number of Clubs:

2022: 1 (owned)

Number of Members:

2022: 1,400

Number of Employees:

2022: 19

Principal & CEO: Xabi
Etcheverry

Revenue:

2022: \$2,733,964

Markets Served: Europe

GENAE FITNESS CLUB

www.genaclub.com

Corporate Headquarters:
France

Number of Clubs:

2022: 3

Principal: 123IM and

LINO LP



CEO: Anthony Barquisseau

Markets Served: Europe

GIGAFIT

www.gigafit.fr

Corporate Headquarters:
France

Number of Clubs:

2022: 100 (mainly
franchised)



CEO: Mountassir Bouhabda

Markets Served: Europe

GLL

www.gll.org

www.better.org.uk

Corporate Headquarters:
London, UK

Number of Clubs:

2022: 230 (leisure centres
and gyms)



Managing Director:

Mark Sesnan

Markets Served: Europe

GO FIT

www.go-fit.es

Corporate Headquarters:
Madrid, Spain

Number of Clubs:

2022: 20

Number of Members:

2022: 211,000

CEO: Mario Barbosa

Revenue:

2022: \$72,555,205

Markets Served: Europe

GOGO LIIKUNTAKESKUS

www.gogo.fi

Corporate Headquarters:
Finland

Number of Clubs:

2022: 18



Principal & CEO:

Taru Vähätalo

Markets Served: Europe

THE GYM GROUP

www.thegymgroup.com

Corporate Headquarters:
London, United Kingdom

Number of Clubs:

2022: 229

Number of Members:

2022: 821,000

CEO: Will Orr

Revenue:

2022: \$213,193,588

Markets Served: Europe

HOLMES PLACE

www.holmesplace.com

Number of Clubs:

2022: 100+



CEO: Jonathan Fisher

Markets Served: Europe,
Middle East

ICONIC HEALTH CLUBS

www.iconichealthclubs.ie

Corporate Headquarters:
Dublin, Ireland

Number of Clubs:

2022: 3 (owned)

Principal: Barry Walsh

Markets Served: Europe

KEEP COOL

Keep Cool
www.keeppcool.fr

Neoness
www.neoness.fr

METABOLIK
[www.sportsclub.
metabolik.fr](http://www.sportsclub.metabolik.fr)

Corporate Headquarters:
Aix en Provence/Paris, France

Number of Clubs:

2022: 302 (partly
franchised)

Number of Members:

2022: 422,000

CEO: David Amiouni

Revenue:

2022: \$133,543,638

Markets Served: Europe

KIESER

www.kieser-training.de

Corporate Headquarters:
Zurich, Switzerland

Number of Clubs:
2022: 147 (mainly
franchised)

Number of Members:
2022: 236,000

CEO: Michael Antonopoulos

Revenue:
2022: \$147,213,460

Markets Served: Europe

KUN SPORTS

<https://b-it-fitness.com>

Corporate Headquarters:
Jeddah, Western Province,
Saudi Arabia

Year Founded: 2019

Number of Clubs:
2022: 28 (6 managed,
22 licensed)

Number of Members:
2022: 24,644

Number of Employees:
2022: 250

Principal: Kun Investment
Holdings



CEO: Muhammad
Nabil Hefni

Markets Served:
Middle East

LEEJAM / FITNESS TIME

FitnessTime.com

Corporate Headquarters:
Riyadh, Saudi Arabia

Number of Clubs:
2022: 156 (owned)

Number of Members:
2022: 327,000

Principal: Publicly Traded
(TADAWUL: 1830)

CEO: Adnan Al Khalaf

Revenue:
2022: \$283,888,149

Markets Served:
Middle East

LEMON GYM

www.lemongym.lt

www.lemongym.lv

www.lemongym.ee

Corporate Headquarters:
Vilnius, Lithuania

Number of Clubs:
2022: 19 (owned)

Number of Members:
2022: 41,175

CEO: Greta Radzeviciene

Markets Served: Europe

LIFEFIT GROUP

Parent Company
www.lifefit-group.com

Fitness First (Germany)
www.fitnessfirst.de

In Shape Fitness Clubs
www.inshape.de

Fitness Loft
www.fitnessloft.de

Elbgym
www.elbgym.de

**Barry's (Germany &
Austria)**
www.barrys.com

Smile X
www.smile-x.de

The Gym Society
www.thegymsociety.com/de

**Pure Barre & Club Pilates
(Germany & Austria)**
www.purebarre.com
www.clubpilates.com

Corporate Headquarters:
Frankfurt, Germany

Number of Clubs:
2022: 124

Number of Members:
2022: 300,000

CEO: Martin Senibold

Revenue:
2022: \$143,007,361

Markets Served: Europe

LIIKU OY

www.liikku.fi

Corporate Headquarters:
Finland

Number of Clubs:
2022: 34 (owned)



Principal & CEO:
Johanna Riihijärvi

Markets Served: Europe

LIJFKRACHT

[www.Lijfkracht.
community](http://www.Lijfkracht.community)

Corporate Headquarters:
Amsterdam, Amsterdam,
Netherlands

Year Founded: 2012

Number of Clubs:
2022: 3

Principals: Jim Breedveld,
Ethan Esser-Horsham,
Ab Trik

CEO: Jim Breedveld

Markets Served: Europe

**LINZENICH GRUPPE
GMBH AND CO KG**

www.linzenich-gruppe.de

Corporate Headquarters:
Cologne, NRW, Germany

Year Founded: 1982

Number of Clubs:
2022: 11 (owned)

Number of Members:
2022: 14,800

Number of Employees:
2022: 154

Principal: Ferdinand
Linzenich

CEO: Marc Linzenich

Markets Served: Europe

MARS SPORTIF

www.macfit.com

Corporate Headquarters:
Istanbul, Turkey

Number of Clubs:
2022: 98

Number of Members:
2022: 240,000

CEO: Sahbey Teke

Revenue:
2022: \$42,060,988

Markets Served: Europe

MIGROS GROUP

www.fitnesspark.ch

www.activefitness.ch

www.migrosfitnesscenter.ch

Corporate Headquarters:
Zurich, Switzerland

Number of Clubs:
2022: 142 (owned)

Number of Members:
2022: 229,000

Revenue:
2022: \$229,232,387

Markets Served: Europe

MRS. SPORTY

www.mrssporty.de

Corporate Headquarters:
Germany

Number of Clubs:
2022: 300 (mainly franchised)



Principal & CEO:
Niclas Bönström

Markets Served: Europe

MY FITNESS

www.myfitness.ee

Corporate Headquarters:
Estonia

Number of Clubs:
2022: 53

Principal: Multiple
Shareholders



CEO: Erkki Torn

Markets Served: Europe

MYGYM

www.mygym-prime.at

Corporate Headquarters:
Salzburg, Austria

Year Founded: 1988

Number of Clubs:
2022: 19 (owned)

Number of Members:
2022: 34,148

Number of Employees:
2022: 210

Principals: Conny and
Christian Hoerl

CEO: Christian Hoerl

Markets Served: Europe

NORDIC WELLNESS

www.nordicwellness.se

Corporate Headquarters:
Sweden

Number of Clubs:
2022: 270+



Principal & CEO:
Magnus Wilhelmsson

Markets Served: Europe

NUFFIELD HEALTH

www.nuffieldhealth.com

Corporate Headquarters:
Epsom, United Kingdom

Number of Clubs:
2022: 114 (owned)

Number of Members:
2022: 366,000

CEO: Steve Gray

Revenue:
2022: \$323,869,611

Markets Served: Europe

L'ORANGE BLEUE

www.lorangebleue.fr

Corporate Headquarters:
Rennes, Bretagne, France

Year Founded: 1996

Number of Clubs:
2022: 380 (20 owned,
360 licensed)

Number of Members:
2022: 350,000

Number of Employees:
2022: 1,000



Principal: Thierry Marquer

CEO: José Nercellas

Markets Served: Europe

PRIME TIME FITNESS GMBH

www.prime-time-fitness.de

Corporate Headquarters:
Frankfurt, Hessen, Germany

Year Founded: 2010

Number of Clubs:
2022: 12 (9 owned,
3 franchised)

Number of Members:
2022: 15,000

Number of Employees:
2022: 150

Principal & CEO:

Henrik Gockel

Revenue:

2022: \$12,363,000

Markets Served: Europe

PUREGYM

www.puregym.com

Corporate Headquarters:
Leeds, United Kingdom

Number of Clubs:
2022: 555 (546 owned,
9 franchised)

Number of Members:
2022: 1,665,000



CEO: Humphrey Cobbold

Revenue:

2022: \$586,929,716

Markets Served: North
America (United States
and/or Canada), Europe,
Middle East

RSG GROUP (EUROPE)

www.rsggroup.com

Corporate Headquarters:
Berlin/Schlüsselfeld,
Germany

Number of Clubs:
2022: 329 (owned)

Number of Members:
2022: 1,805,000

CEO: Hagen Wingerts Zahn

Revenue:

2022: \$390,115,668

Markets Served: Europe,
Middle East, North America

RUSSIAN FITNESS GROUP

www.worldclass.ru

Corporate Headquarters:
Russia

Number of Clubs:
2022: 111

Principal: Group of
shareholders



CEO: Nikolay Pryanishnikov

Markets Served: Europe

SATS GROUP

www.satsgroup.com

Corporate Headquarters:
Oslo, Norway

Number of Clubs:
2022: 275 (owned)

Number of Members:
2022: 721,000

Principal: Publicly Traded
(SATS.OSE)



CEO: Sondre Gravir

Revenue:

2022: \$424,368,437

Markets Served: Europe

SC FITNESS

Corporate Headquarters:
Portugal

Number of Clubs:
2022: 40

Number of Members:
2022: 96,000

Revenue:

2022: \$39,957,939

Markets Served: Europe

STARS FITNESS**www.starsfitness.at****Corporate Headquarters:**
Vienna, Austria**Year Founded:** 2005**Number of Clubs:**
2022: 4 (owned)**Number of Members:**
2022: 5,000**Number of Employees:**
2022: 70**Principal & CEO:**

Philip Rosenstingl

Markets Served: Europe**STRATA FITNESS HOLDINGS****www.strata.ru****Corporate Headquarters:**
Russia**CEO:** Anastasia Yusina**Markets Served:** Europe**THIRD SPACE****www.thirdspace.london****Corporate Headquarters:**
London, United Kingdom**Year Founded:** 2001**Number of Clubs:**
2022: 7**CEO:** Colin Waggett**Markets Served:** Europe**L'USINE CLUBS DE SPORT****www.usinesportsclub.com****Corporate Headquarters:**
Paris, IDF, France**Year Founded:** 2004**Number of Clubs:**
2022: 5 (4 owned,
1 licensed)**Number of Members:**
2022: 6,000**Number of Employees:**
2022: 40**Principals:** Patrick
Joly Patrick, Rizzo
Investissement**CEO:** Patrick Joly**Revenue:**
2022: \$57,833,859**Markets Served:** Europe**VIRGIN ACTIVE****www.virginactive.com****Corporate Headquarters:**
London, United Kingdom**Number of Clubs:**
2022: 75 (owned)**Number of Members:**
2022: 266,000**CEO:** Dean Kowarski**Markets Served:** Europe,
Africa, Asia-Pacific**VIVAGYM GROUP****VivaGym****www.vivagym.es****Fitness Hut****www.fitnesshut.pt****Corporate Headquarters:**
Malaga, Spain**Number of Clubs:**
2022: 102 (owned)**Number of Members:**
2022: 270,000**CEO:** Jual del Rio Nieto**Revenue:**
2022: \$79,915,878**Markets Served:** Europe**WEST WOOD CLUB****www.westwood.ie****Corporate Headquarters:**
Dublin, Ireland**Year Founded:** 1988**Number of Clubs:**
2022: 7 (owned)**Number of Members:**
2022: 38,784**Number of Employees:**
2022: 430**Principal:** West Wood Club**CEO:** Alan Leach**Revenue:**
2022: \$37,854,890**Markets Served:** Europe**WORLD CLASS ROMANIA****www.worldclass.ro****Corporate Headquarters:**
Romania**Number of Clubs:**
2022: 43**Number of Members:**
2022: 58,000**CEO:** Kent Orrgren**Revenue:**
2022: \$37,854,890**Markets Served:** Europe

LATIN AMERICA

ACADEMIA GUSTAVO BORGES**www.academiagb.com.br****Corporate Headquarters:**
São Paulo, SP, Brazil**Number of Clubs:**
2022: 3**Principal:** Gustavo Borges**CEO:** Renato Ramalho**Markets Served:** Latin
America (Mexico, Central
& South America and/or
Caribbean Islands)

ACTIVE

www.activefunctional.com

Corporate Headquarters:

Buenos Aires, Argentina

Year Founded: 2010

Number of Clubs:

2022: 11 (1 owned, 1 licensed, 9 franchised)

Number of Members:

2022: 3,000

Number of Employees:

2022: 90

Principals: Adrian Schiavello, Julian Rud, Nicolás Wainstein, Laura Finelli

Markets Served: Latin America (Mexico, Central & South America and/or Caribbean Islands)

BIGG

www.bigg.fit

Corporate Headquarters:

Buenos Aires, Argentina

Year Founded: 2013

Number of Clubs:

2022: 60 (10 owned, 55 franchised)

Number of Members:

2022: 15,000

Number of Employees:

2022: 150

Principals: Bautista Amadeo, Ignacio Alsogaray, Guido Mazzoni, Guillermo Mazzoni



CEO: Guillermo Mazzoni

Markets Served: Latin America (Mexico, Central & South America and/or Caribbean Islands)

BLUE FIT ACADEMIA

www.bluefitacademia.com.br

Corporate Headquarters:

Brazil

Number of Clubs:

2022: 130+ (mainly franchised)

CEO: Filipe Savoia

Market Served: Latin America (Mexico, Central & South America and/or Caribbean Islands)

BODYSHOP ATHLETIC CLUB

https://bodyshop.do

Corporate Headquarters:

Santo Domingo, Dominican Republic

Year Founded: 1986

Number of Clubs:

2022: 6 (all owned)

Number of Members:

2022: 13,569

Number of Employees:

2022: 245

Principals: Noris Rodríguez De Bernal, Anthony Bernal



CEO: Jorge Gastón Rodríguez Prado

Markets Served: Latin America (Mexico, Central & South America and/or Caribbean Islands)

BODYTECH / FORMULA

www.bodytech.com.br

www.formulaacademia.com.br

Corporate Headquarters:

Rio de Janeiro, Brazil

Number of Clubs:

2022: 95 (partly franchised)



CEO: Luiz Urquiza

Markets Served:

Latin America

BODYTECH / SPORTLIFE

www.bodytech.com.co

www.sportlife.cl

Corporate Headquarters:

Bogotá, Colombia

Year Founded: 1997

Number of Clubs:

2022: 154 (125 owned, 29 franchised)

Number of Members:

2022: 195,000

Number of Employees:

2022: 2,650

Principals: Nicolas Loaiza, Gigliola Aycardi, L Catterton, Teka Capital



CEO: Nicolas Loaiza

Markets Served: Latin America (Mexico, Central & South America and/or Caribbean Islands)

COMPANHIA ATHLETICA

www.ciaathletica.com.br

Corporate Headquarters:

São Paulo, SP, Brazil

Year Founded: 1985

Number of Clubs:

2022: 15 (15 owned)

Number of Members:

2022: 24,570

Principals: Richard Bilton and Gary Schulze

CEO: Richard L. Thorp Bilton

Revenue:

2022: \$20,227,183

Markets Served: Latin America (Mexico, Central & South America and/or Caribbean Islands)

DMOOV

www.dmoov.com

Corporate Headquarters:

Santiago, Región Metropolitana, Chile

Year Founded: 2015

Number of Clubs:

2022: 8 (2 owned, 1 licensed, 5 franchised)

Number of Members:

2022: 10,000

Number of Employees:

2022: 240

Principals: Felipe Apablaza, Familia Matijevec



CEO: Felipe Apablaza

Markets Served: Latin America (Mexico, Central & South America and/or Caribbean Islands)

ENERGY CLUB

www.energy.cl

Corporate Headquarters:

Santiago, Region Metropolitana, Chile

Year Founded: 1997

Number of Clubs:

2022: 33 (23 owned, 10 franchised)

Number of Members:

2022: 60,000

Principal: Alex Wiesner

CEO: Alex Wiesner

Markets Served: Latin America (Mexico, Central & South America and/or Caribbean Islands)

ENTRENATE

Instagram:
@entrenate_mvd

Corporate Headquarters:
Montevideo, Uruguay

Year Founded: 2014

Number of Clubs:
2022: 1 (owned)

Number of Members:
2022: 500

Principals: Diego Ligrone and Federico Semino

CEO: Diego Ligrone and Federico Semino

Markets Served: Latin America (Mexico, Central & South America and/or Caribbean Islands)

EQUINOX CORPORATE GYM

www.equinox.com

Corporate Headquarters:
Tegucigalpa, Francisco Morazan, Honduras

Year Founded: 2018

Number of Clubs:
2022: 3 (owned)

Number of Members:
2022: 8,500

Number of Employees:
2022: 90

Markets Served: Latin America (Mexico, Central & South America and/or Caribbean Islands)

FRANQUICIAS DOMINICANAS (GOLD'S GYM DOMINICAN REPUBLIC)

www.goldsgym.com.do

Corporate Headquarters:
Santo Domingo, Dominican Republic

Number of Clubs:
2022: 2



Principal & CEO:
Ian A. Rondon

Market Served: Latin America (Mexico, Central & South America and/or Caribbean Islands)

GIMNASIOS COUNTRY Y HUMAN SPORT ELITE TRAINING

www.countryspahn.com

Corporate Headquarters:
San Pedro Sula, Cortés, Honduras

Year Founded: 1989

Number of Clubs:
2022: 4 (owned)

Number of Members:
2022: 1,148

Number of Employees:
2022: 36

Principal & CEO:
Celenia Anderson

Markets Served: Latin America (Mexico, Central & South America and/or Caribbean Islands)

GOLD'S GYM VENEZUELA

www.goldsgym.com.ve

Corporate Headquarters:
Venezuela

Number of Clubs:
2022: 3



Principal & CEO:
Andrés Capriles

Market Served: Latin America (Mexico, Central & South America and/or Caribbean Islands)

GRUPO MEGATLON

www.megatlon.com

www.fiter.com

Corporate Headquarters:
Buenos Aires, Argentina

Year Founded: 1999

Number of Clubs:
2022: 57 (44 owned, 13 managed)

Number of Members:
2022: 181,196

Number of Employees:
2022: 1,578

Principal: Fernando Storchi y Diego Pellegrino



CEO: Fernando Storchi

Revenue:
2022: \$66,600,000

Markets Served: Latin America (Mexico, Central & South America and/or Caribbean Islands)

GRUPO SPORTS WORLD

www.sportsworld.com.mx

Corporate Headquarters:
Mexico City, Mexico

Year Founded: 1989

Number of Clubs:
2022: 52 (owned)

Principal: Publicly Traded (BMV: SPORT) (BIVA: SPORT)



CEO: Fabián Bifaretti Zanetto

Markets Served: Latin America (Mexico, Central & South America and/or Caribbean Islands)

GU HOLDING

www.9round.mx

Corporate Headquarters:
Miguel Hidalgo, Mexico City, Mexico

Year Founded: 2011

Number of Clubs:
2022: 23 (19 owned, 4 franchised)

Number of Members:
2022: 3,800

Number of Employees:
2022: 150

CEO: Isaac Kably

Markets Served: Latin America (Mexico, Central & South America and/or Caribbean Islands)

MINDFIT CHILE

www.mindfit.cl

Corporate Headquarters:
Santiago, Región Metropolitana, Chile

Year Founded: 2021

Number of Clubs:
2022: 5 (owned)

Number of Members:
2022: 1,200

Number of Employees:
2022: 120

Principal & CEO:
Paulina Toledo Jorquera

Markets Served: Latin America (Mexico, Central & South America and/or Caribbean Islands)

MULTISPA

www.Multispa.cr

Corporate Headquarters:
San Jose, Costa Rica

Year Founded: 1986

Number of Clubs:
2022: 7 (6 owned, 1 managed)

Number of Members:
2022: 4,946

Number of Employees:
2022: 150



Principal: David Mears

CEO: Ariel Mora

Markets Served: Latin America (Mexico, Central & South America and/or Caribbean Islands)

NELSON VARGAS

<https://anv.mx>

Corporate Headquarters: Mexico City, Mexico

Year Founded: 1978

Number of Clubs: 2022: 17 (owned)

Number of Members: 2022: 18,000

Number of Employees: 2022: 840

Principals: Nelson Vargas Basañez, Fernando Vargas Escalera, Nelson Vargas Escalera



CEO: Nelson Vargas Escalera

Markets Served: Latin America (Mexico, Central & South America and/or Caribbean Islands)

ON FIT

www.onfit.com.ar

Corporate Headquarters: Buenos Aires, Argentina

Year Founded: 2014

Number of Clubs: 2022: 12

Number of Members: 2022: 24,600

Number of Employees: 2022: 280

Principal & CEO: Guido Miguez y Juan Pablo Gotelli

Markets Served: Latin America (Mexico, Central & South America and/or Caribbean Islands)

PACIFIC FITNESS

www.gimnasiopacific.cl

Corporate Headquarters: Chile

Year Founded: 1997

Number of Clubs: 2022: 76

CEO: David Pezo

Markets Served: Latin America (Mexico, Central & South America and/or Caribbean Islands)

THE PILATES STUDIO BRAZIL

www.pilates.com.br

Corporate Headquarters: Brazil

Number of Clubs: 2022: 30+ (mainly franchised)

Principal & CEO: Inélia Garcia

Markets Served: Latin America (Mexico, Central & South America and/or Caribbean Islands), Europe

PLANET FITNESS (MEXICO)

www.planetfitness.mx

Corporate Headquarters: Mexico City, Mexico City, Mexico

Year Founded: 2021

Number of Clubs: 2022: 9

Number of Employees: 2022: 250

Principal: Argonne Capital Group

Markets Served: Latin America (Mexico, Central & South America and/or Caribbean Islands)

POWERCLUB

www.powerclubpanama.com

Corporate Headquarters: Panama

Year Founded: 2003

Number of Clubs: 2022: 11 (owned)

Principals: Guillermo Saint Malo, Sión Gadeloff

CEO: Itzel Hasday

Markets Served: Latin America (Mexico, Central & South America and/or Caribbean Islands)

PRATIQUE FITNESS

www.pratiquefitness.com.br

Corporate Headquarters: Belo Horizonte, Minas Gerais, Brazil

Number of Clubs: 2022: 70+

CEO: Harley Tadeu

Market Served: Latin America (Mexico, Central & South America and/or Caribbean Islands)

PREMIER FITNESS CLUB

www.premier.com.bo

Corporate Headquarters: Santa Cruz, Bolivia

Year Founded: 1999

Number of Clubs: 2022: 30 (25 owned, 5 franchised)

Number of Members: 2022: 8,000

Number of Employees: 2022: 420



Principal & CEO: Ricardo Issa

Markets Served: Latin America (Mexico, Central & South America and/or Caribbean Islands)

SELFIT ACADEMIAS

www.selfitacademias.com.br

Corporate Headquarters: Brazil

Number of Clubs: 2022: 80+ (mainly franchised)

Markets Served: Latin America (Mexico, Central & South America and/or Caribbean Islands)

SMART FIT

<https://investor.smartfit.com.br>

Corporate Headquarters: São Paulo, SP, Brazil

Year Founded: 1996

Number of Clubs: 2022: 1,236 (975 owned, 261 franchised)

Number of Members: 2022: 3,800,000

Number of Employees: 2022: 12,810

Principal: Publicly Traded (BVMF: SMFT3)



CEO: Edgard Corona

Revenue: 2022: \$610,222,652

Markets Served: Latin America (Mexico, Central & South America and/or Caribbean Islands)

SMART FIT (ARGENTINA FRANCHISEE)

www.smartfit.com.ar

Corporate Headquarters: Buenos Aires, Argentina

Year Founded: 2009

Number of Clubs: 2022: 6

Number of Members: 2022: 4,000

Number of Employees: 2022: 100

CEO: Celso Guimaraes

Markets Served: Latin America (Mexico, Central & South America and/or Caribbean Islands)

SPORT CITY

www.sportcity.com.mx

Corporate Headquarters: Mexico City, Mexico

Number of Clubs: 2022: 25

Market Served: Latin America (Mexico, Central & South America and/or Caribbean Islands)

SPORTCLUB

www.sportclub.com.ar

Corporate Headquarters: Buenos Aires, Argentina

Year Founded: 1990

Number of Clubs: 2022: 160+*

CEO: Dardo de Marchi

Market Served: Latin America (Mexico, Central & South America and/or Caribbean Islands)

**Includes health and fitness club facilities only. Excludes outdoor/footgolf facilities, Familia centers, and co-working spaces.*

SPORTIUM

www.sportium.com.mx

Corporate Headquarters: Mexico City, Mexico

Year Founded: 2003

Number of Clubs: 2022: 11 (owned)

Number of Members: 2022: 32,684



CEO: Enrique Vera del Castillo

Markets Served: Latin America (Mexico, Central & South America and/or Caribbean Islands)

STATION 24 FITNESS

www.station24.com

Corporate Headquarters: Guadalajara, Jalisco, Mexico

Year Founded: 2010

Number of Clubs: 2022: 48 (44 owned, 4 franchised)

Number of Members: 2022: 50,000

Number of Employees: 2022: 425

Principal & CEO: Allan Acosta

Markets Served: Latin America (Mexico, Central & South America and/or Caribbean Islands)

TAURUS FITNESS COMPANY

www.gimnasiotaurus.com

Corporate Headquarters: Guayaquil, Guayas, Ecuador

Year Founded: 1990

Number of Clubs: 2022: 4

Number of Members: 2022: 25,000

Number of Employees: 2022: 160

Principal: Leonardo Quezada

CEO: Daniela Quezada

Markets Served: Latin America (Mexico, Central & South America and/or Caribbean Islands)

ULTRA GYM & FITNESS

www.ultragym.mx

Corporate Headquarters: Mexicali, Baja California, Mexico

Year Founded: 2008

Number of Clubs: 2022: 20 (owned)

Number of Members: 2022: 21,000

Number of Employees: 2022: 230

CEO: Fabián Villalobos

Markets Served: Latin America (Mexico, Central & South America and/or Caribbean Islands)

VIVO 47

www.vivo47.com

Corporate Headquarters: Guadalajara, Jalisco, Mexico

Year Founded: 2004

Number of Clubs: 2022: 12 (owned)

Number of Members: 2022: 30,000

Number of Employees: 2022: 300

Principals: Gerardo and Carmen Villarreal

CEO: Gerardo Villarreal

Markets Served: Latin America (Mexico, Central & South America and/or Caribbean Islands)

NORTH AMERICA

24 HOUR FITNESS

www.24hourfitness.com

Corporate Headquarters: Carlsbad, CA, USA

Year Founded: 1983

Number of Clubs: 2022: 283 (owned)

Number of Members: 2022: 2,140,000

Principal: All Day AcquisitionCo LLC



CEO: Karl Sanft

Markets Served: North America (United States and/or Canada)

9ROUND

www.9round.com

Corporate Headquarters: USA

Year Founded:

Number of Clubs: 2022: 500+ (mainly franchised)

CEO: Shannon Hudson

Markets Served: North America (United States and/or Canada), Latin America (Mexico, Central & South America and/or Caribbean Islands), Europe, Middle East, Africa, Asia-Pacific

ACTIVE WELLNESS LLC

www.activewellness.com

Corporate Headquarters: San Francisco, CA, USA

Year Founded: 2014

Number of Clubs: 2022: 40

Number of Members:

2022: 50,000

Number of Employees:

2022: 417

Principal: Jill Kinney, Bill McBride, and Carey White**CEO:** Bill McBride**Revenue:**

2022: \$19,293,992

Markets Served: North America (United States and/or Canada)**ANYTIME FITNESS**anytimefitness.com**Corporate Headquarters:**

Woodbury, MN, USA

Year Founded: 2012**Number of Clubs:**

2022: 5,143 (16 owned, 5,127 franchised)

Number of Members:

2022: 3,900,000

Number of Employees:

2022: 281

**Principal:** Chuck Runyon, Dave Mortensen**CEO:** Chuck Runyon**Markets Served:** North America (United States and/or Canada), Latin America (Mexico, Central & South America and/or Caribbean Islands), Europe, Middle East, Africa, Asia-Pacific**THE ATLANTIC CLUB**www.theatlanticclub.com**Corporate Headquarters:**

Manasquan, NJ, USA

Number of Clubs:

2022: 2 (owned)

Principal: Patricia Laus**CEO:** Kevin McHugh**Markets Served:** North America (United States and/or Canada)**ATLANTIC COAST ATHLETIC CLUBS (ACAC)**www.acac.com**Corporate Headquarters:**

Charlottesville, VA, USA

Number of Clubs:

2022: 6

**CEO:** Chris Craytor**Markets Served:** USA**B/SPOKE STUDIOS**www.bspokestudios.com**Corporate Headquarters:**

Boston, MA, USA

Year Founded: 2014**Number of Clubs:**

2022: 4 (owned)

Number of Members:

2022: 475

Number of Employees:

2022: 130

Principal & CEO:

Mark Partin

Markets Served: North America (United States and/or Canada)**BARRY'S BOOTCAMP**www.barrys.com**Corporate Headquarters:**

Los Angeles, CA, USA

Number of Clubs:

2022: 80+

CEO: Joey Gonzalez**Markets Served:** North America (United States and/or Canada), Latin America (Mexico, Central & South America and/or Caribbean Islands), Europe, Middle East, Asia-Pacific**THE BAY CLUB COMPANY**www.bayclubs.com**Corporate Headquarters:**

Pleasanton, CA, USA

Year Founded: 1977**Number of Clubs:**

2022: 22 (owned)

Number of Members:

2022: 103,000

Number of Employees:

2022: 2,317

Principal: KKR Co. & Inc**CEO:** Matthew J. Stevens**Revenue:**

2022: \$222,000,000

Markets Served: North America (United States and/or Canada)**THE BELMONT ATHLETIC CLUB****Corporate Headquarters:**

Long Beach, CA, USA

Year Founded: 1980**Number of Clubs:**

2022: 1 (owned)

Number of Members:

2022: 1,574

Number of Employees:

2022: 64

**Principal & CEO:** Jeff Cozart**Revenue:**

2022: \$2,029,816

Markets Served: North America (United States and/or Canada)**BRICK BODIES / PF GROWTH PARTNERS, LLC**www.brickbodies.com**Corporate Headquarters:**

Timonium, MD, USA

Number of Clubs:

2022: 73

**Principals:** Lynne & C. Victor Brick**CEO (Brick Bodies):** Vicki Brick**CEO (PF Growth Partners, LLC):** C. Victor Brick**Markets Served:** North America (United States and/or Canada), Asia-Pacific**BURN BOOT CAMP**www.burnbootcamp.com**Corporate Headquarters:**

USA

Number of Clubs:

2022: 300+ (mainly franchised)

CEO: Morgan Kline

Markets Served: North America (United States and/or Canada)

CHELSEA PIERS

www.chelseapiers.com

Corporate Headquarters: Stamford, CT, USA

Year Founded: 1995

Number of Clubs: 2022: 3 (owned)

Principals: Roland W. Betts, Tom A. Bernstein, and David A. Tewksbury

CEO: Roland W. Betts

Markets Served: North America (United States and/or Canada)

CLUB FIT

www.clubfit.com

Corporate Headquarters: Jefferson Valley, NY, USA

Year Founded: 1973

Number of Clubs: 2022: 2 (owned)

Number of Members: 2022: 8,050

Number of Employees: 2022: 350



Principal & CEO: Bill Beck

Markets Served: North America (United States and/or Canada)

CLUB GREENWOOD

www.clubgreenwood.com

Corporate Headquarters: Greenwood Village, CO, USA

Year Founded: 1987

Number of Clubs: 2022: 1

Number of Members: 2022: 5,238

Number of Employees: 2022: 250

Principal: Greenwood Athletic Club Metropolitan District

CEO: J. Madden

Revenue: 2022: \$11,809,677

Markets Served: North America (United States and/or Canada)

CLUBFITNESS GREENSBORO

www.clubfitnessgso.com

Corporate Headquarters: Greensboro, NC, USA

Year Founded: 1999

Number of Clubs: 2022: 2 (owned)

Number of Members: 2022: 1,217

Number of Employees: 2022: 36

Principal: Dr. Donald Linder



CEO: Maria Gonzalez

Markets Served: North America (United States and/or Canada)

COOPER FITNESS CENTER

www.cooperaerobics.com

Corporate Headquarters: Dallas, TX, USA

Year Founded: 1972

Number of Clubs: 2022: 1 (owned)

Number of Members: 2022: 3,708

Principal: Kenneth H. Cooper, MD, MPH



CEO: Dr. Tyler Cooper, MD, MPH

Revenue: 2022: \$13,016,016

Markets Served: North America (United States and/or Canada)

CROSSFIT RYE CANYON & BARBELL CLUB

www.crossfitryecanyon.com

Corporate Headquarters: Valencia, CA, USA

Year Founded: 2021

Number of Clubs: 2022: 1 (owned)

Principal & CEO: Eric Campbell

Markets Served: North America (United States and/or Canada)

CRUNCH HOLDINGS, LLC

www.crunch.com

Corporate Headquarters: New York, New York, USA

Number of Clubs: 2022: 421 (41 owned, 1 licensed, 379 franchised)

Number of Members: 2022: 2,160,000

Number of Employees: 2022: 1,900

Principal: TPG Growth



CEO: Jim Rowley



CEO, Crunch Franchise: Ben Midgley

Markets Served: North America (United States and/or Canada), Latin America (Mexico, Central & South America and/or Caribbean Islands), Europe, Asia-Pacific

DEDHAM HEALTH & ATHLETIC COMPLEX

www.dedhamhealth.com

Corporate Headquarters: Dedham, MA, USA

Number of Clubs: 2022: 1



Principal: Lloyd Gainsboro



CEO: Roberta Gainsboro

Markets Served: USA

DISCOVER STRENGTH

www.discoverstrength.com

Corporate Headquarters: St Louis Park, MN, USA

Year Founded: 2006

Number of Clubs: 2022: 9 (6 owned, 3 franchised)

Number of Employees: 2022: 75

**Principal & CEO:**

Luke Carlson

Markets Served: North America (United States and/or Canada)

DMB SPORTS CLUBS LP

www.villageclubs.com

Corporate Headquarters:

Phoenix, AZ, USA

Year Founded: 1976

Number of Clubs:

2022: 4 (owned)

Number of Members:

2022: 21,100

Number of Employees:

2022: 685

**Principal & CEO:**

Carol Nalevanko

Revenue:

2022: \$40,800,000

Markets Served: North America (United States and/or Canada)

EAST BANK CLUB

www.eastbankclub.com

Corporate Headquarters:

Chicago, IL, USA

Year Founded: 1980

Number of Clubs:

2022: 1

Number of Members:

2022: 9,200

Number of Employees:

2022: 500

**Principal:** Daniel Levin**CEO:** Mel Kleist**Revenue:**

2022: \$52,000,000

Markets Served: North America (United States and/or Canada)

ENERGY FITNESS

www.energyfitness.com

Corporate Headquarters:

St. James, NY, USA

Number of Clubs:

2022: 5

**Chief Growth Officer:**

Jeff Sanders

Markets Served: North America (United States and/or Canada)

EQUINOX HOLDINGS, INC.**Equinox**

www.equinox.com

Blink Fitness

www.blinkfitness.com

SoulCycle

www.soul-cycle.com

Pure Yoga

www.pureyoga.com

Corporate Headquarters:

New York, New York, USA

Number of Clubs:

2022: 273

**CEO (Equinox):**

Harvey Spevak

CEO (SoulCycle):

Evelyn Webster

Markets Served: North

America (United States and/or Canada)

F45 TRAINING

www.f45training.com

Corporate Headquarters:

Los Angeles, CA, USA

Number of Clubs:

2022: 1,900+ (mainly franchised)

CEO: Tom Dowd

Markets Served: North America (United States and/or Canada), Latin America (Mexico, Central & South America and/or Caribbean Islands), Europe, Africa, Asia-Pacific

FITNESS FORMULA CLUBS

www.ffc.com

Corporate Headquarters:

Chicago, IL, USA

Year Founded: 1984

Number of Clubs:

2022: 12 (10 owned, 2 managed)

Number of Employees:

2022: 810

**Principal & CEO:**

Gale Landers

Markets Served: North America (United States and/or Canada)

FITNESS SF

www.Fitnesssf.com

Corporate Headquarters:

Corte Madera, CA, USA

Year Founded: 2012

Number of Clubs:

2022: 8 (owned)

Number of Members:

2022: 35,000

Principal & CEO:

Zsolt Jackovics

Markets Served: North America (United States and/or Canada)

FITNESS WORLD CANADA

www.fitnessworld.ca

Corporate Headquarters:

Richmond, BC, Canada

Year Founded: 2020

Number of Clubs:

2022: 17 (owned)

Number of Members:

2022: 80,000

Number of Employees:

2022: 700

**CEO:** Chris Smith**Revenue:**

2022: \$30,745,580

Markets Served: North America (United States and/or Canada)

FRANCO'S ATHLETIC CLUB

www.francosmandeville.com

Corporate Headquarters: Mandeville, LA, USA

Number of Clubs: 2022: 3



Principals: Ron & Sandy Franco

CEO: Jamie Hamler

Markets Served: North America (United States and/or Canada)

GAINESVILLE HEALTH AND FITNESS

www.ghfc.com

Corporate Headquarters: Gainesville, FL, USA

Year Founded: 1978

Number of Clubs: 2022: 3 (owned)

Principal & CEO: Joe Cirulli

Markets Served: North America (United States and/or Canada)

GENESIS HEALTH CLUBS

www.genesishealthclubs.com

Corporate Headquarters: Wichita, KS, USA

Year Founded: 1994

Number of Clubs: 2022: 64 (owned)

Number of Employees: 2022: 5,200



Principal & CEO: Rodney Steven II

Markets Served: North America (United States and/or Canada)

GO M.A.D. FITNESS

www.gomadfitness.com

Corporate Headquarters: Monroe, MI, USA

Number of Clubs: 2022: 4 (owned)



Principal: Jason Reinhardt

Markets Served: North America (United States and/or Canada)

GOLD'S GYM INTERNATIONAL

www.goldsgym.com

Corporate Headquarters: Dallas, TX, USA

Number of Clubs: 2022: 600+

Principal: RSG Group

Markets Served: North America (United States and/or Canada), Latin America (Mexico, Central & South America and/or Caribbean Islands), Europe, Middle East, Africa, Asia-Pacific

GOODLIFE FITNESS GROUP (INCLUDES GOODLIFE FITNESS, FIT4LESS, AND ECONOFITNESS CLUBS)

GoodLife Fitness
www.goodlifefitness.com

Fit4Less
www.fit4less.ca

EconoFitness
www.econofitness.ca

CanFitPro
www.canfitpro.com

Corporate Headquarters: London, Ontario, Canada

Year Founded: 1979

Number of Clubs: 2022: 370 (owned)

Number of Members: 2022: 1,300,000



Principal & CEO: David Patchell Evans

Markets Served: North America (United States and/or Canada)

HEALTHTRAX INTERNATIONAL

www.healthtrax.com

Corporate Headquarters: Glastonbury, CT, USA

Number of Clubs: 2022: 15



Principal & CEO: Steve Capezone

Markets Served: North America (United States and/or Canada)

HEALTHWORKS

www.healthworksfitness.com

Corporate Headquarters: Cambridge, MA, USA

Year Founded:

Number of Clubs: 2022: 10 (5 Healthworks, 2 Gymit, 2 Healthworks Foundation, 1 Republic Fitness)



President: Mark Harrington, Jr.

Markets Served: North America (United States and/or Canada)

HOTWORX

www.hotworx.net

Corporate Headquarters: Marrero, LA, USA

Number of Clubs: 2022: 409 (4 owned, 405 franchised)

CEO: Stephen P. Smith

Markets Served: North America (United States and/or Canada)

THE HOUSTONIAN CLUB

www.houstonian.com

Corporate Headquarters: Houston, TX, USA

Year Founded: 1980

Number of Clubs: 2022: 1

Number of Members: 2022: 4,984

Number of Employees: 2022: 210

Principal: Redstone Group

CEO: John Durie

Revenue:

2022: \$44,845,968

Markets Served: North America (United States and/or Canada)

LIFE TIME

www.lifetime.life

Corporate Headquarters: Chanhassen, MN, USA

Year Founded: 1992

Number of Clubs: 2022: 161 (owned)

Number of Members: 2022: 1,400,000

Number of Employees: 2022: 34,000

Principal: Publicly Traded (NYSE: LTH)



CEO: Bahram Akradi

Revenue:

2022: \$1,822,557,000

Markets Served: North America (United States and/or Canada)

LIFEWORKS OF SOUTHWEST GENERAL

www.lifeworksfitness.net

Corporate Headquarters: Middleburg Heights, Ohio, USA

Year Founded: 1999

Number of Clubs: 2022: 1 (owned)

Number of Members: 2022: 3,994

Number of Employees: 2022: 64

Principal: Southwest General Health Center

CEO: William A. Young Jr

Revenue:

2022: \$2,581,633

Markets Served: North America (United States and/or Canada)

LIFT BRANDS

Parent Company
www.liftbrands.com

Snap Fitness
www.snapfitness.com

9round
www.9round.co.uk

FITSTOP
www.fitstop.com

Corporate Headquarters: Chanhassen, MN, USA

Number of Clubs: 2022: 1,100+ (mainly franchised)*



CEO: Ty Menzies

Markets Served: North America (United States and/or Canada), Latin America (Mexico, Central & South America and/or Caribbean Islands), Europe, Middle East, Asia-Pacific

**Excludes 9Round locations.*

LITTLE ROCK ATHLETIC CENTERS, LLC.

www.lrac.com

Corporate Headquarters: Little Rock, AR, USA

Year Founded: 1985

Number of Clubs: 2022: 4 (3 owned, 1 managed)

Number of Members: 2022: 6,732

Number of Employees: 2022: 316



Principal & CEO: Frank Lawrence

Markets Served: North America (United States and/or Canada)

MERRITT CLUBS

www.merrittclubs.com

Corporate Headquarters: Baltimore, MD, USA

Year Founded: 1977

Number of Clubs: 2022: 13 (9 owned, 4 managed)

Number of Members: 2022: 19,231

Number of Employees: 2022: 869

Principal: Scott Dorsey

CEO: Robb Merritt

Revenue: 2022: \$28,078,613

Markets Served: North America (United States and/or Canada)

METHOD GYMS

www.methodgym.com

Corporate Headquarters: Potomac, MD, USA

Year Founded: 2017

Number of Clubs: 2022: 3

Number of Members: 2022: 8,500

Number of Employees: 2022: 125



Principal: Al Noshirvani

CEO: Andy Stromburg

Markets Served: North America (United States and/or Canada)

NEWTOWN ATHLETIC CLUB

www.newtownathletic.com

Corporate Headquarters: Newtown, PA, USA

Number of Clubs: 2022: 2 (owned)



Principal & CEO: Jim Worthington

Markets Served: North America (United States and/or Canada)

OAKLAND HILLS TENNIS CLUB

www.oaklandhills.com

Corporate Headquarters: Oakland, CA, USA

Year Founded: 1974

Number of Clubs: 2022: 1 (owned)

Number of Members: 2022: 3,200

Number of Employees: 2022: 60

Principal: James W. Thompson

Revenue:

2022: \$3,080,000

Markets Served: North America (United States and/or Canada)**ONELIFE FITNESS**www.onelifefitness.com**Corporate Headquarters:** Mclean, VA, USA**Year Founded:** 2006**Number of Clubs:**

2022: 55 (owned)

Number of Employees:

2022: 4,000

Principal: Delos Capital**CEO:** Ori Gorfine**Markets Served:** North America (United States and/or Canada)**ORANGETHEORY**www.Orangetheory.com**Corporate Headquarters:** Boca Raton, FL, USA**Number of Clubs:**

2022: 1,528 (mainly franchised)

Principal: David Long, Ellen Latham, and Jerome Kern**CEO:** David Long**Markets Served:** North America (United States and/or Canada), Latin America (Mexico, Central & South America and/or Caribbean Islands), Europe, Middle East, Asia-Pacific**P20 | EMS STUDIO**www.personal20.net**Corporate Headquarters:** Reston, VA, USA**Year Founded:** 2016**Number of Clubs:**

2022: 8

**Principals:** Constance Ruiz and Pedro Ruiz**CEO:** Constance Ruiz**Markets Served:** North America (United States and/or Canada), Europe, Middle East**THE PASEO CLUB**www.thepaseoclub.com**Corporate Headquarters:** Valencia, CA, USA**Year Founded:** 2003**Number of Clubs:**

2022: 1 (owned)

Number of Members:

2022: 1,298

Number of Employees:

2022: 96

Principal & CEO: Ken Beall**Revenue:**

2022: \$4,250,314

Markets Served: North America (United States and/or Canada)**PLANET FITNESS**www.planetfitness.com**Corporate Headquarters:** Hampton, NH, USA**Year Founded:** 1992**Number of Clubs:**

2022: 2,410 (234 owned, 2,176 franchised)

Number of Members:

2022: 17,000,000

Number of Employees:

2022: 3,137

Principal: Publicly Traded (NYSE: PLNT)**CEO:** Chris Rondeau**Revenue:**

2022: \$936,800,000

Markets Served: North America (United States and/or Canada), Latin America (Mexico, Central & South America and/or Caribbean Islands), Asia-Pacific**POWERHOUSE GYMS INTERNATIONAL**www.powerhousegym.com**Corporate Headquarters:** Novi, MI, USA**Year Founded:** 1974**Number of Clubs:**

2022: 270 (14 owned, 256 licensed,)

Number of Members:

2022: 1,800,000

Number of Employees:

2022: 9,000

Principals: William Dabish, Henry Dabish, Victor Dabish, Michael Dabish, and Jonathon Dabish**CEO:** Henry William Dabish**Revenue:**

2022: \$245,000,000

Markets Served: North America (United States and/or Canada), Latin America (Mexico, Central & South America and/or Caribbean Islands), Europe, Middle East, Asia-Pacific**PRO CLUB**www.proclub.com**Corporate Headquarters:** Bellevue, WA, USA**Year Founded:** 1973**Number of Clubs:**

2022: 2 (owned)

Number of Members:

2022: 11,500

Number of Employees:

2022: 450

Principal:

Dr. Mark Dedomenico

CEO: Mark Dedomenico**Markets Served:** North America (United States and/or Canada)**RETRO FITNESS**www.retrofitness.com**Corporate Headquarters:** West Palm Beach, FL, USA**Year Founded:** 2005**Number of Clubs:**

2022: 100 (mainly franchised)

Number of Members:

2022: 250,000

CEO: Andrew Alfano**Markets Served:** North America (United States and/or Canada)**ROCHESTER ATHLETIC CLUB**www.racmn.com**Corporate Headquarters:** Rochester, MN, USA**Year Founded:** 1993**Number of Clubs:**

2022: 1 (owned)

Number of Members:

2022: 12,860

Number of Employees:
2022: 375

Principal: Matt Remick
and Jack Remick



CEO: Matt Remick

Revenue:
2022: \$11,163,875

Markets Served: North
America (United States
and/or Canada)

[SOLIDCORE]

www.solidcore.co

Corporate Headquarters:
Washington DC, USA

Year Founded: 2013

Number of Clubs:
2022: 87 (owned)

Number of Employees:
2022: 1,200



CEO: Bryan Myers

Markets Served: North
America (United States
and/or Canada)

SPARROW MAC

www.themac.org

Corporate Headquarters:
East Lansing, MI, USA

Year Founded: 2008

Number of Clubs:
2022: 1 (owned)

Number of Members:
2022: 12,300

Number of Employees:
2022: 350

Principal: Sparrow

CEO: Jim Dover

Markets Served: North
America (United States
and/or Canada)

SPENGA

www.spenga.com

Corporate Headquarters:
Homer Glen, IL, USA

Year Founded: 2015

Number of Clubs:
2022: 65 (1 owned,
64 franchised)

Principal & CEO:
Roger McGreal

Markets Served: North
America (United States
and/or Canada)

SPORTSPLEX NEW WINDSOR

www.sportsplex-nw.com

Corporate Headquarters:
New Windsor, NY, USA

Year Founded: 2017

Number of Clubs:
2022: 1 (owned)

Number of Members:
2022: 1,082

Number of Employees:
2022: 88

Principals: Jason Stokes
and Mark Savage

CEO: Jason Stokes

Markets Served: North
America (United States
and/or Canada)

STONE CREEK CLUB & SPA

**www.stonecreekclub
andspa.com**

Corporate Headquarters:
Covington, La, USA

Year Founded: 2009

Number of Clubs:
2022: 1 (owned)

Number of Members:
2022: 5,045

Number of Employees:
2022: 210

Principals: Scott R.
Gutterman, Gerald Bolte,
and Tim Lindsay

CEO: Marvin Gresse

Revenue:
2022: \$8,333,000

Markets Served: North
America (United States
and/or Canada)

STYLES STUDIOS FITNESS

**www.stylesstudiosfitness.
com**

Corporate Headquarters:
Farmington, IL, USA

Number of Clubs:
2022: 1



Principals: Carrie Kepple,
Amy Styles

Markets Served: North
America (United States
and/or Canada)

SUN CITY LINCOLN HILLS

www.suncity-lincolnhills.org

Corporate Headquarters:
Lincoln, CA, USA

Year Founded: 2000

Number of Clubs:
2022: 2 (owned)

Number of Members:
2022: 12,000

Principal: Homeowners
Association

CEO: Kyle Bodyfelt

Markets Served: North
America (United States
and/or Canada)

UFC GYM

www.ufcgy.com

Corporate Headquarters:
Santa Ana, CA, USA

Number of Clubs:
2022: 150+

Principal: New Evolution
Ventures (NeV)



CEO: Adam Sedlack

Markets Served: North
America (United States and/
or Canada), Latin America
(Mexico, Central & South
America and/or Caribbean
Islands), Europe, Middle
East, Asia-Pacific

UNIVERSAL ATHLETIC CLUB

**www.universalathletic
club.com**

Corporate Headquarters:
Lancaster, PA, USA

Year Founded: 1994

Number of Clubs:
2022: 1 (owned)

Number of Employees:
2022: 195



Principal & CEO:
Rick Casselbury

Revenue:
2022: \$8,140,000

Markets Served: North
America (United States
and/or Canada)

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**VALLEY HEALTH
AND FITNESS**

www.valleyhealthandfitness.ca

Corporate Headquarters:

Cobble Hill, BC, Canada

Year Founded: 1997

Number of Clubs:

2022: 1 (owned)

Number of Members:

2022: 1,935

Number of Employees:

2022: 6

Principals: Forrest Verbruggen, Joel Verbruggen, and Christine Switzer

CEO: Forrest Verbruggen

Markets Served: North America (United States and/or Canada)

VIDA FITNESS

www.vidafitness.com

Corporate Headquarters:

Washington DC, USA

Year Founded: 2006

Number of Clubs:

2022: 6 (owned)

Number of Members:

2022: 13,268

Number of Employees:

2022: 419

**Principal & CEO:**

David von Storch

Revenue:

2022: \$37,598,441

Markets Served: North America (United States and/or Canada)

**WAVERLEY OAKS
ATHLETIC CLUB**

www.waverleyoaks.com

Corporate Headquarters:

Waltham, MA, USA

Year Founded: 1979

Number of Clubs:

2022: 1 (owned)

Number of Members:

2022: 5,505

Number of Employees:

2022: 96

Principal: Duffy Brothers Property Management Company

CEO: Board of Directors**Revenue:**

2022: \$4,417,489

Markets Served: North America (United States and/or Canada)

WEYMOUTH CLUB

www.weymouthclub.com

Corporate Headquarters:

Weymouth, MA, USA

Year Founded: 1988

Number of Clubs:

2022: 1 (owned)

Number of Members:

2022: 3,297

Number of Employees:

2022: 195

Principals: Sally Goldman and Steve Goldman

**CEO:** Jeffrey Linn**Revenue:**

2022: \$10,989,363

Markets Served: North America (United States and/or Canada)

**WISCONSIN ATHLETIC
CLUB, LLC**

www.thewac.com

Corporate Headquarters:

West Allis, Wisconsin, USA

Year Founded: 1976

Number of Clubs:

2022: 8 (owned)

Number of Members:

2022: 24,482

Number of Employees:

2022: 1,050

Principals: Raymond K O'Connor, Keith Nygren, and Chez Misko

**CEO:** Raymond K O'Connor

Markets Served: North America (United States and/or Canada)

**WORKOUT ANYTIME
FRANCHISING SYSTEMS,
LLC**

www.workoutanytime.com

Corporate Headquarters:

Alpharetta, GA, USA

Number of Clubs:

2022: 190+

Principals: Steven Strickland, Mark de Gorter, John Quattrocch

CEO: Steven Strickland

Markets Served: North America (United States and/or Canada)

**WORLD GYM
INTERNATIONAL**

www.worldgym.com

Corporate Headquarters:

Costa Mesa, CA USA

Number of Clubs:

2022: 200+

**Principal:** Guy Cammilleri**CEO:** Lewis Stanton

Markets Served: North America (United States and/or Canada), Latin America (Mexico, Central & South America and/or Caribbean Islands), Europe, Middle East, Asia-Pacific

XPONENTIAL FITNESS

www.xponential.com

Corporate Headquarters:

Irvine, CA, USA

Year Founded: 2017

Number of Clubs:

2022: 2,641 (56 owned, 2,585 franchised)

Number of Members:

2022: 590,000

Principal: Publicly Traded (NYSE: XPOF)

CEO: Anthony Geisler**Revenue:**

2022: \$245,000,000

Markets Served: North America (United States and/or Canada), Latin America (Mexico, Central & South America and/or Caribbean Islands), Europe, Middle East, Asia-Pacific



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AUTOMATION**



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ABC Fitness (ABC) is the market-leading software and services provider for fitness businesses globally. Founded in 1981, it has 40+ years of track record of helping fitness operators of all sizes anywhere in the world turn their visions of fitness into seamless reality. It provides solutions to simplify the business of fitness: from sales and marketing communications to booking and engagement apps,

operations, and business intelligence to revenue management and payment processing.

From personal trainers, boutique studios, and gyms to international franchise health clubs, ABC Fitness provides tailored solutions to various segments of the fitness industry through its dedicated yet complementary and integrated platforms—ABC Evo, ABC Glofox, ABC Ignite, and ABC Trainerize.



Together, ABC currently helps 31,000 clubs in over 92 countries, collectively serving more than 38 million members around the world. Each year it processes more than \$10.5 billion in payments.

BEAVERFIT

(775) 624-6307
[beaverfitusa.com](https://www.beaverfitusa.com)

BeaverFit is a veteran-owned company offering world-class outdoor training solutions and custom manufacturing to empower individuals to achieve their mission, however they train, wherever they train.

As the industry leader in providing outdoor functional training equipment, BeaverFit has installed thousands of outdoor training solutions to all branches of the U.S. military, NATO forces, universities, fitness clubs, and Fortune 500 companies.

All products are made in the USA and proven to perform in the toughest training environments. With in-house design engineers and manufacturing, the BeaverFit team proudly takes on the challenge of creating custom, turnkey equipment solutions that meet the specific space, needs, and training requirements of our partners.

At BeaverFit, it's our mission to empower you to perform any task—from simple, to essential, to extraordinary. Because everyone has a mission that matters.

BEAVERFIT™



BODYSRIPT**(800) 833-1506 • (661) 964-0217****Bodyscript.com**

The **BodyScript** Body Composition Analyzer technology provides gold-standard body measurements. BodyScript uses safe, FDA-approved near infrared technology (NIR), designed to detect the specific light-absorption characteristics of body fat, water, bone, and muscle. No need to remove shoes or socks. No meal or beverage restrictions.

Test any time of day. The revolutionary BodyScript mobile app allows users to instantly scan their test results directly from the BodyScript results screen. Test results can be used by personal trainers, nutritionists, physicians, or anyone providing health and fitness guidance.

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Through experienced independent insurance agents, **The Cincinnati Insurance Company** provides property casualty insurance and services. Together, we can customize an insurance program specifically for your fitness, sports, or recreational facility.

Our commercial policyholders receive personal service and depth of insurance knowledge from local independent agents, exceptional claims service, and access to discounted rates from vendors offering specialized loss control, background check, and training services.

About Cincinnati Insurance:

- Local field associates typically live in or near your community to serve you person-to-person.
- Ranked among the 25 largest U.S. property casualty insurer groups, based on 2021 net premiums written.
- Our insurer financial-strength ratings show our ability to meet financial obligations to policyholders. Please visit cinfin.com for our latest published ratings and rankings; ratings are under continuous review and are subject to change.

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CLUB AUTOMATION

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Club Automation's fully integrated fitness club management software revolutionizes the way you run your business. Experience the power of innovation through streamlined operations, enhanced member experiences, and driven sustainable growth. Club Automation's comprehensive suite of tools combines advanced features, intuitive interfaces, and seamless integrations, empowering you to optimize efficiency, deliver personalized services, and build thriving fitness communities.

Say goodbye to manual processes and embrace the power of automation, freeing up time and resources for more valuable endeavors. Club Automation's commitment to excellence ensures that you stay ahead in the ever-evolving fitness industry, adapting to new trends and challenges seamlessly. Experience the future of fitness club management with Club Automation and unlock the potential for unmatched success in your business.



CLUBREADY

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ClubReady is the leading provider of full-suite fitness studio and club management software and services designed to run your business and attract, retain, and engage members. The integrated suite of solutions automates and modernizes the multi-unit fitness organization to increase membership, provide cost savings, reduce workload, offer additional revenue streams, and increase member satisfaction.

With core capabilities including membership management, lead management, billing and payment processing, scheduling and booking, staff management, custom-branded apps, marketing automation, access, business analytics, performance tracking, on-demand fitness, and lead conversion services, ClubReady is designed to help every type of fitness modality meet their growth objectives from startup to scale up.



CRUNCH FITNESS**Crunch.com**

Crunch is a gym that believes in making serious exercise fun by fusing fitness and entertainment and pioneering a philosophy of “No Judgments.” Crunch serves a fitness community for all kinds of people with all types of goals, exercising all different ways, working it out at the same place together. Today, we are renowned for creating one-of-a-kind

group fitness classes and unique programming for our wildly diverse members. Headquartered in New York City, Crunch serves two million members with over 430 gyms worldwide in 37 states, the District of Columbia, Australia, Canada, Costa Rica, Portugal, Puerto Rico, and Spain. Crunch is rapidly expanding across the U.S. and around the globe.

**EGYM****(720) 900-2526****egym.com/us**

EGYM is a global fitness technology leader that provides fitness and health facilities with intelligent workout solutions built on connected gym equipment and software. EGYM empowers gym operators to deliver a comprehensive experience through

its smart gym equipment and digital solutions to support their members' fitness journey and provide data-based guidance to help them stay motivated and achieve their goal of a healthier life with improved physical and mental wellness.

E G Y M

FITNESS ON DEMAND

(952) 567-2710

fodvirtual.com

Fitness On Demand, owned by Lift Brands, is a performance partner for gyms, multi-family housing, and corporate wellness. We offer a brandable experience with data to help our customers make profitable decisions to drive engagement. Our hybrid fitness solution allows our clients to reach their customers while helping them to meet their health

goals through journeys, push-notifications, livestreams, challenges, pre-scheduled classes, data tracking and more! Fitness OnDemand is available in studio, on any club display system and via FLEX by Fitness On Demand, streaming to member smartphones, tablets and other devices in club, at home or on the go.



With EGYM Your Club Gets

MORE

Members
Profitable Growth
Brand Differentiation



EGYM offers an ecosystem of products customized to your clubs needs. Our combination of smart equipment, digital apps, software, and services, and our personalized training programs help you turn member success into gym success. Scan the QR code to learn more. Or contact us at us-sales@egym.com

EGYM

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Hapana is an end-to-end fitness studio software designed to elevate engagement and fuel growth. With a robust suite of streamlined features, it alleviates owners from having to use multiple plugins and incompatible software.

**IMPULSE (QINGDAO) HEALTH TECH CO.,LTD**+86 532-85793158 • impulsehealthtech.com • Facebook.com/ImpulseHealthTechInstagram.com/impulsefitness.cc • Youtube.com/@impulsefitness

Impulse is a leading supplier in the health industry in China. The goal of Impulse is to build a perfect product and service system in the fields of fitness equipment R&D, manufacturing, marketing and sales, club operation, and health management.

We are committed to providing competitive products, services and sales support for operators in the fitness industry and to achieving maximum value for our customers

according to their needs. Our products have been sold to hundreds of countries and regions, and created global marketing and after-sale systems.

We believe that the trust of customers comes from our pursuit of product excellence and exploration of customer needs. Therefore, Impulse is going to continue following the concept of customer first and quality priority in order to serve our business partners, and become reliable fitness experts trusted by global customers.

impulse
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FOCUSED ON OUR STRENGTHS



Strengthen the core of your business with the professional advice of local independent insurance agents and associates from The Cincinnati Insurance Company. Offering policyholders on-site and virtual evaluations, training and other resources, we put in the work to keep you on track.

Visit cinfm.com/fitness-sports/ to find an independent agent representing Cincinnati Insurance.



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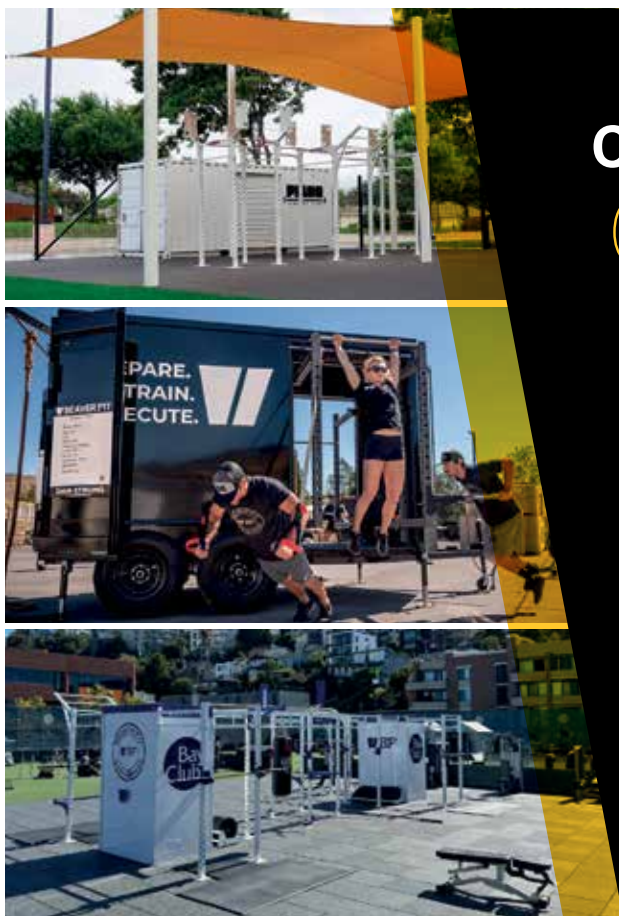
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jonasfitness.com • salesinfo@jonasfitness.com

For over 40 years, **Jonas Fitness** has been the industry-leading CMS provider and has managed billing services for the industry's top facilities. With our comprehensive and user-friendly Club Management Software, Compete, clubs see growth in their revenue, reduced operating costs, increased membership retention, and find solutions to business challenges across every aspect of their member life cycle.

Additionally, with a 99.99% system uptime, our AWS Cloud Services give you the stability and speed you need. For day-to-day support, our industry-leading customer support staff is there to assist you anytime, including after-hours.

With our best-in-class PCI-compliant software, proven customer support, and an extensive library of API partner integrations, Jonas Fitness is the ideal fit for any fitness facility.



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YOUR MEMBERS
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At **K&K**, fun comes in all sizes; a trusted provider for over 75 years, we provide competitively priced, customized insurance programs designed for a variety of fitness facilities.

**Health Club Program—
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Health, racquet, and athletic club operations offering a full range of services, including pro/sport shops, snack bars, spa services, tanning, child care, etc.

Health Clubs—
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Designed for fitness and racquet clubs. Annual revenue must be

\$2,000,000 or less (excluding sign-up fees) on a per location basis. 24-hour facility options available.

**Health Club Program—
Limited Services**

Available to health clubs with annual sales of \$500,000 or less. Must be fully staffed during open hours.

Exercise/Personal Training Studios

Quote and buy coverage online! Offered to studio facilities under 3,000 square feet under the direct supervision of a fitness professional. Must be fully staffed during open hours.



Ask your insurance agent for a quote from K&K!

LES MILLS**(844) 537-6455****lesmills.com/us/gen-fit-training/ • lesmills.com/us/**

Gen Z will have a bigger impact on the fitness market than any generation before, presenting a transformative opportunity for clubs to drive record growth. That's according to a new global report examining the biggest-ever study into Gen Z fitness habits, motivations to work out, and the barriers holding them back.

Nurturing this untapped market requires an understanding of the challenges they face. As many as 81% of Gen Z who exercise take part in group workouts. Among non-

exercisers, 68% want to start working out at home, so providing high-quality digital options is essential for clubs. Their top reasons to exercise are linked to health and happiness, demonstrating a strong appreciation for the holistic benefits of activity. This is a generation working out for mental wellness, intrinsic motivation, and the chance to be part of a community.

Access the free report via the link above to uncover the must-have insights and recommendations for achieving sustained success.

LesMILLS

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Life Fitness is the world leader in commercial fitness equipment, and we can be found at the best health clubs and fitness facilities around the globe. For more than 55 years, Life Fitness has been dedicated to creating innovative fitness solutions that benefit both fitness facilities and exercisers. In that time, we've earned a reputation for crafting effective, inviting, and extremely reliable cardio and strength equipment. Our Hammer Strength brand has been building elite athletes, and

those determined to train like one, for more than three decades. Hammer Strength's rugged equipment is the most durable on the market and is designed to withstand the most intense workouts. Life Fitness and Hammer Strength products combine to create a comprehensive portfolio that allows for fitness facilities and exercisers to create the experiences ideal for them. Breadth gives us the power to be inclusive and provide the tools that inspire healthier lives.

Life Fitness



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Matrix is one of the most trusted and recognized brands in the industry, loved by members, owners, trainers, and service people alike. We offer the industry's most robust product portfolio, plus exclusive integrated technology solutions that differentiate your facility to meet your members in and outside the club. Our forward-thinking designs redefine the exercise experience for all involved, making every interaction with our equipment smarter, easier,

and more enjoyable. Count on Matrix for a partner who will be there—for your grand opening and every day after—with the world's finest fitness equipment and so much more. Matrix is the commercial brand of Johnson Health Tech Co Ltd. (JHT), one of the largest manufacturers of fitness equipment in the world. With 45+ years of experience, JHT is a truly global company with more than 30 subsidiaries worldwide.

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Merrithew—Leaders in Mindful Movement—is the global leader in mind-body education and equipment. Founded in 1988, the company has trained more than 70,000 instructors worldwide, developed innovative education programs—STOTT PILATES, ZEN•GA, Total Barre, Halo Training, Merrithew Fascial Movement, and CORE Athletic Conditioning and Performance Training—and produced an extensive line of professional and at-home equipment and accessories for personal and professional use. In recent years, Merrithew launched the Merrithew Connect App, a digital streaming platform featuring the latest Pilates, fitness, and mind-body workouts and training.

Recognized as The Professional's Choice, Merrithew's premium equipment and accessories are crafted for professional and at-home use. Our equipment is designed to be easily customizable and adjustable for every type of client. Some of our bestselling pieces include the CE certified V2 Max Plus Reformer, Stability Barre, Halo Trainer Plus and dual-purpose Stability Barrel. We also offer an extensive collection of Reformer accessories, exercise mats, kids' fitness props, yoga and strength training accessories, massage, agility, and rehab tools. With the opening of our first European distribution center, European consumers can now expect faster shipping, better prices, and personalized service.



Merrithew offers in-person and online training options, including certification programs, continuing education credits, and professional development workshops. With Merrithew's nearly 200 training centers around the world, keeping your knowledge fresh and up to date has never been easier or more accessible. Our comprehensive education provides instructors with practical programming options that they can immediately incorporate into any group fitness, rehab, or personal training setting.

MYE FITNESS TECHNOLOGIES

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Our commitment to the fitness industry began with development of the first wireless entertainment system over 20 years ago. Today, **MYE Fitness Technologies** is the industry's largest and most trusted global provider of fitness entertainment and technology, including the AppAudio Smartphone TV Audio system, the BodyScript Body Composition Analyzer, Cardio Machine TVs, Cardio Theater style

TV Audio receivers and transmitters, and the Direct Connect and Wireless CableSAT Channel Changer. Advanced design makes MYE the choice of leading club operators and major cardio equipment brands—including Cybex, Life Fitness, Matrix, Nautilus, Octane, Precor, SportsArt, Star Trac, StairMaster, Technogym, and Freemotion—developing integrated digital TVs, wireless audio, and sophisticated mobile applications.



ROR PARTNERS**(858) 298-2268****rorpartners.com**

At **ROR Partners**, we turn targeted data into results with omni-channel marketing campaigns.

We understand that successful marketing goes beyond reaching a wide audience; it's about engaging the right people at the right time and in the right place. That's why we dive deep into data analysis to identify your target audience's preferences, behaviors, and interests.

Using this invaluable information, we develop strategies that integrate various channels, from traditional media to digital platforms, to create a cohesive brand experience. Our team of experts crafts personalized

content, ensuring that every message resonates with your audience across all channels.

With our data-driven approach, we continuously monitor campaign performance, making real-time adjustments to optimize results. Delivering detailed reports and analytics to measure success and return on your investment.

ROR Partners unlocks the potential of data to model unique personas and deliver omni-channel campaigns that captivate your audience, drive conversions, and maximize your brand's growth.

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Established in 1936, **Salsbury Industries—Lockers.com** is the industry leader in the manufacturing and distributing of quality metal lockers, wood lockers, plastic lockers, and storage solutions.

Salsbury Industries is an ISO 9001:2015 certified company. Operating in nearly 600,000 square feet in greater Los Angeles, Salsbury Industries carries a wide variety of

quality products that can be shipped factory direct from our large inventory. Most orders ship within 1–2 business days of receipt. Customer service representatives are available to provide free quotations, product information and expert guidance every Monday through Friday from 6 a.m. to 5 p.m. PST.



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A pioneer in sustainable fitness, **SportsArt** has been innovating design and manufacturing premium fitness equipment since 1977. Our mission is to engineer beautiful, smart, innovative products and technologies that help sustain the health of people and our planet. Our ECO-POWR line, the world's only energy-generating cardio equipment, features patented technology that captures 74% of the energy generated during a workout and feeds it back into the grid. Along with ECO-POWR, SportsArt offers a full range of high-quality cardio,

strength, and rehabilitation equipment for the fitness, medical, and residential markets.

Our state-of-the-art, 500,000+-square-foot manufacturing space is ISO-14001 certified, enabling us to design, manufacture, and test our products in a way that reduces overall environmental impact. Today, SportsArt is one of the world's largest single-brand manufacturers and sold in over 70 countries. By creating fitness solutions that positively impact users, partners and the planet, SportsArt is inspiring performance for our shared world.



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Founded in 1983, **Technogym** is a world-leading brand in fitness, wellness, sport, and health. Technogym provides a complete ecosystem made of connected smart fitness equipment, digital services, and training content. Thanks to the Mywellness Cloud Platform people can connect to their personal training experience anywhere, both on Technogym equipment and mobile devices. With over 2,500

employees Technogym is present in over 100 countries. More than 85,000 wellness centers and 400,000 private homes in the world are equipped with Technogym. Technogym has been appointed Official Supplier to the Paris 2024 Olympics for the ninth time, after Sydney 2000, Athens 2004, Turin 2006, Beijing 2008, London 2012, Rio 2016, Pyeongchang 2018, and Tokyo 2020.



WELLNESSPACE BRANDS (FORMERLY HYDROMASSAGE)

(727) 536-5566

[WellnessSpace.com](https://www.WellnessSpace.com)

WellnessSpace Brands offers an industry-leading suite of experiential wellness products, including HydroMassage, CryoLounge+, and RelaxSpace. Each of the company's innovative product lines have a shared vision to provide people around the world with access to

convenient, technology-based solutions for mind and body wellness. Headquartered in Tampa Bay, FL, the company previously known as HydroMassage has a 30+ year history of partnering with global leaders in the health, wellness, fitness, and hospitality markets.



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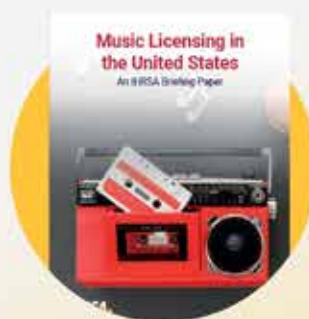
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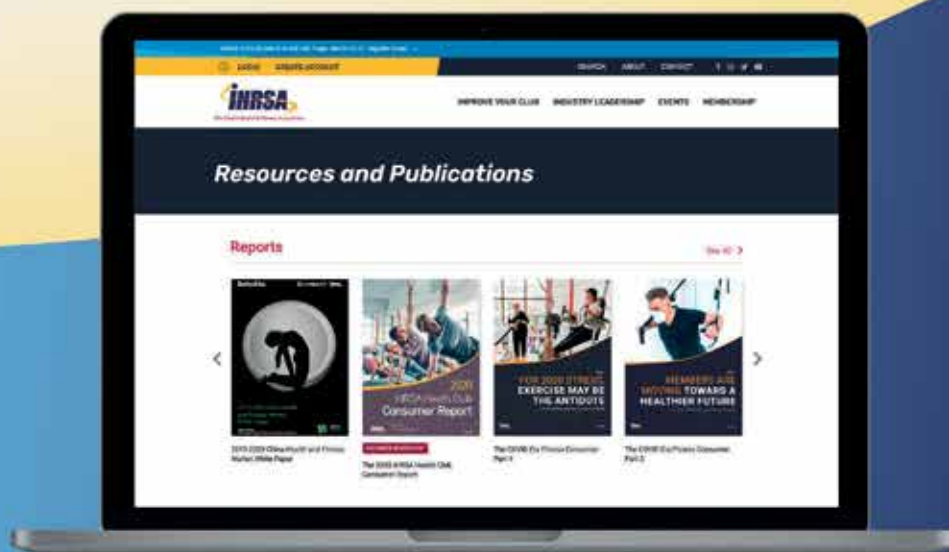


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BIODRIVE SYSTEM

PATENTED



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Maximum muscle contraction



CORRECT POSTURE

Automatic posture setup

Biostrength™ helps you avoid the most common strength training mistakes to get up to 30% more results from your workout. Thanks to the patented Biodrive System, you can easily and automatically:

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- Find the proper range of motion
- Set the right tempo and number of reps
- Get the correct rest time

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