THE IHRSA
GLOBAL REPORT
2016

INDUSTRY OVERVIEW

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Another Year of Growth for Global Health Club Industry

UNITED STATES & CANADA
In North America, this past year has seen the continued proliferation of high-volume/low-price (HVLP), or budget, facilities, and of studios and boutiques with singular specialties. Among them: personal and small-group training, cycling, rowing, boot camp, cross training, yoga, Pilates, barre, martial arts, and sports performance training. The appeal of these activities to a “connoisseur audience” has produced several counterintuitive results: surprisingly high fees (e.g., $34 for a 45-minute SoulCycle class), and multi-memberships.

According to The 2015 IHRSA Health Club Consumer Report: The Story Behind Members and their Health & Fitness Clubs, published in September, 16% of health club members now belong to more than one facility.

“Members appear willing to pay more to get what they want—the specialized coaching, personal interaction, and sense of community that many of the studio models offer,” explained Molly Kemmer, the regional director for EXOS|MediFit Community Services, and IHRSA’s current chairperson. “The study indicates that this presents an opportunity for club operators to leverage this trend, and to create studio facilities, or a studio concept within a larger, conventional club, and to charge accordingly if they can deliver the desired experience.”
Global Health Club Industry Posts Growth in Membership & Club Businesses Despite Challenging Economy in Select Markets

In the U.S., the health club industry continued to grow. Revenue, health club membership and the total number of clubs all rose from 2014 to 2015. Revenue increased from $24.2 billion in 2014 to $25.8 billion in 2015, while membership improved from 54.1 million to 55.3 million over the same timespan. Club count also grew from 34,460 locations to 36,180 sites in the U.S.

The IHRSA Canadian Health Club Report indicates that club operators serve nearly 6 million members at roughly 6,000 facilities in Canada. IBISWorld, an independent industry research firm, projects that revenue from gyms and health clubs in Canada will increase through 2019. Consumer demand for health and fitness programs to help address obesity, active aging, proper nutrition, and sports performance will help drive growth for health clubs.

Leading markets continue to perform well in Latin America. Brazil's 31,000 health clubs put the country second only to the U.S. among global fitness markets. Roughly 8 million Brazilians are members of a health club. In all, 16 markets in Latin America attract nearly 16 million consumers to more than 55,000 health clubs.

The IHRSA Latin American Report shows that opportunities for growth remain in the region as member penetration rates remain low in comparison with developed health club markets worldwide.

By Melissa Rodriguez
The top 10 countries account for 71% of total industry revenue.

The top 10 countries account for 67% of the world's health clubs.

TOTAL TOP TEN: $57.5 BILLION

TOTAL TOP TEN: 124,633
LEADING CLUB COMPANIES

24 HOUR FITNESS
USA, INC.
24hourfitness.com
Corporate Headquarters: San Ramon, CA, USA
Phone: +1 (925) 543-3100
Number of Clubs: 2015: 441
Number of Members: 2015: 3,800,000
Principal: AEA Investors LP, Ontario Teachers' Pension Plan, Fitness Capital Partners
CEO: Mark Smith
President: Frank Napolitano
Markets Served: USA

360 FITNESS
www.360fitness.ca
Corporate Headquarters: Red Deer, AB, Canada
Phone: +1 (403) 347-1707
Number of Clubs: 2015: 2
Number of Members: 2015: 690
Principal: Jack Wheeler, Don Stirling, Brooke Einarson-Schaab
CEO: Jack Wheeler
Markets Served: Canada
Media Contact: Jack Wheeler +1 (403) 872-7742
Revenues: 2015: $1,840,525
2014: $1,503,748

9ROUND
9round.com
Corporate Headquarters: Littleton, MA, USA
Phone: +1 (866) 613-7978
Number of Clubs: 2015: 456
2014: 217
CEO: Shannon Hudson
Markets Served: USA, Australia, Canada, Jordan, Mexico, Saudi Arabia, UK

ABS FITNESS & WELLNESS CLUB
www.absfitness.in
Corporate Headquarters: Pune, Maharashtra, India
Phone: +91 20 6601 0700
Number of Clubs: 2015: 12
CEO: Abhimanyu Sable
Markets Served: India

ACAC FITNESS AND WELLNESS CENTERS
acac.com
Corporate Headquarters: Charlottesville, VA, USA
Phone: +1 (434) 974-9890
Number of Clubs: 2015: 11
Principal: Phil Wendel
CEO: Greg Wells
Markets Served: USA

ACADEMIA GUSTAVO BORGES
academiagb.com.br
Corporate Headquarters: São Paulo, SP, Brazil
Phone: +55 11 5051 8009
Number of Clubs: 2015: 5
Principal: Gustavo Borges
Markets Served: Brazil

ACTIC
actic.se
Corporate Headquarters: Täby, Sweden
Number of Clubs: 2015: 152
2014: 144
Number of Members: 2015: 210,000
2014: 208,000
Principal: IK Investment Partners and other minority shareholders
CEO: Christer Zaar
Markets Served: Europe
Revenues: 2015: $92,063,600

ACTIVE WELLNESS, LLC
activewellness.com
Corporate Headquarters: Sausalito, CA, USA
Phone: +1 (415) 377-8595
Number of Clubs: 2015: 60 (7 owned, 53 managed)
2014: 58 (7 owned, 51 managed)
Principal: Privately Held

LEADING CLUB COMPANIES

This section provides basic information about many of the world's leading health club companies. The figures reported were obtained either from the companies themselves or from public, published sources. None of the figures have been independently corroborated by IHRSA. Revenues are reported in U.S. dollars. In reporting number of clubs, figures may refer to number of units and/or franchises. For a complete list of IHRSA clubs, please visit healthclubs.com.

Indicates membership in the IHRSA Industry Leadership Council. Visit ihrsa.org/industry-leadership-council to learn more.