

The numbers tell the story: the health club industry continues to expand its presence around the globe and to serve more people every year. In 2017, health club membership topped 174 million consumers around the world. Global industry revenue totaled an estimated \$87.2 billion in 2017 and, for the first time, the club count exceeded 200,000 facilities.



While these numbers should be celebrated, they are not enough. In March, during IHRSA 2018 in San Diego, IHRSA Board Chair Derek Gallup announced a new global initiative to increase health club usage around the world. The goal of the initiative is to reach 230 million health club members worldwide by 2030.

Joining Gallup at IHRSA 2018 were more than 12,000 fitness industry professionals from more than 80 countries. They experienced the latest equipment and technology during early morning workouts and the high-energy two-day trade show which featured more than 400 exhibitors. They also attended educational sessions given by industry experts, networked with their peers, and left with a renewed sense of excitement about the future.

Sunny San Diego is such a popular destination for IHRSA members that we are headed back there (March 13-16) for IHRSA 2019! We hope you will join us then, and/or at any of these upcoming events:

- The IHRSA Institute, to be held in Chapel Hill, North Carolina (July 31-August 3);
- The IHRSA/Fitness Brasil Latin American Conference & Trade Show, to be held in São Paulo, Brazil (August 30 - September 1);
- The IHRSA European Congress, to be held in Lisbon, Portugal (October 15-18);
- The ChinaFit/IHRSA China Management Forum, to be held in Shanghai, China (December 2-5).

On a final note, this past year, the association launched the new IHRSA.org—a revamped website designed to help health and fitness industry professionals supercharge business growth. Fueled by an intensive 18-month audit of the types of content that IHRSA members search for and read the most, the new IHRSA.org is mobile-friendly, features a bold design, and is jam-packed with useful information and tools. Be sure to check it out, and let us know what you think!

Yours in health,

Jay Ablondi  
Publisher

Kristen Walsh  
Associate Publisher



# 2018 IHRSA Global Report

## INDUSTRY OVERVIEW

- 9 • Another Eventful, Successful Year for Global Health Club Industry

## RESEARCH

- 29 • Global Health Club Industry Reaches All-time High of 174 Million Members in 65 Markets
- 32 • Global Statistics
- 34 • Top Ten Global Markets
- 36 • The Americas
- 39 • The United States
- 44 • Asia-Pacific
- 47 • Europe
- 51 • Middle East & North Africa

## COMPANY PROFILES

- 53 • Alphabetical by Company Name
- 95 • Index by Country

## SUPPLIER PROFILES

- 97 • Alphabetical by Company Name

## ADVERTISER INDEX

- 120 • Alphabetical by Company Name



© 2018 IHRSA  
All Rights Reserved  
**International Health, Racquet  
& Sportsclub Association**  
70 Fargo Street  
Boston, MA 02210 USA  
+1 617/951-0055, +1 800/228-4772  
[ihrsa.org](http://ihrsa.org)  
[healthclubs.com](http://healthclubs.com)

PUBLISHER: **Jay Ablondi**  
ASSOCIATE PUBLISHER: **Kristen Walsh**  
SENIOR RESEARCH MANAGER: **Melissa Rodriguez**  
DESIGNER: Deborah Bush Design, Inc.

*To access all IHRSA publications, videos, webinars and MP3 audio recordings, visit [ihrsa.org/store](http://ihrsa.org/store).*



Chair-elect Jim Worthington and the Newtown Athletic Club team give IHRSA 2018 a thumbs-up

By Kristen Walsh

## Another Eventful, Successful Year for Global Health Club Industry

In March, more than 12,000 fitness industry professionals from more than 80 countries convened in San Diego for IHRSA 2018. They experienced the latest equipment and technology during the two-day trade show and early morning workouts, attended educational sessions given by industry experts and global leaders, and networked at various social events, all in an effort to grow their businesses and, more importantly, to improve the health of their communities and the world.

Rick Caro moderated the 22nd Annual IHRSA Financial Panel during IHRSA 2018. The president of Management Vision, a New York-based consultancy firm, Caro revealed that the largest single year of growth for our industry has happened in the past year (2016-2017) at 6% membership

growth. “Keep in mind the studio users who may not be members and the growth of the industry is even more impressive,” he added, noting that our industry was once considered “recession resistant” but has secured its title as “recession resilient.”

During IHRSA 2018, three members were elected to the IHRSA Board of Directors. They are Chris Craytor, the president and COO of acac Fitness & Wellness Centers, headquartered in Charlottesville, Virginia; Michele Melkerson-Granryd, the general manager of Castle Hill Fitness 360, in Austin, Texas; and Monica Marques, the owner, partner, and fitness director of Companhia Athletica, based in São Paulo, Brazil. All three have vast industry experience both with fitness and with IHRSA.

# Global Health Club Industry Reaches All-time High of **174 Million Members** in 65 Markets

By Melissa Rodriguez



## inside

### INDUSTRY RESEARCH

#### Global Market

32 • Size & Scope

#### Top 10 Global Markets

34 • Industry Revenue  
34 • Number of Clubs  
35 • Number of Members  
35 • Membership Penetration Rates

#### Americas

36 • Industry Revenue  
36 • Number of Clubs  
37 • Number of Members  
37 • Membership Penetration Rates

#### United States

39 • Number of Clubs  
40 • Penetration Rates by Top States  
42 • Health Club Members  
42 • Health Club Consumers  
43 • Health Club Visits  
43 • Non-Member Health Club Users

#### Asia-Pacific

44 • Industry Revenue  
44 • Number of Clubs  
45 • Number of Members  
45 • Membership Penetration Rates

#### Europe

47 • Industry Revenue  
47 • Number of Clubs  
48 • Number of Members  
48 • Membership Penetration Rates

#### MENA

51 • Industry Revenue  
51 • Number of Clubs  
52 • Number of Members  
52 • Membership Penetration Rates

**In 2017, health club membership topped 174 million consumers around the globe. Total industry revenue totaled an estimated \$87.2 billion in 2017 and the club count exceeded 200,000 facilities. As leading markets posted strong performance, emerging markets—particularly in the Asia-Pacific region—showed potential for continued growth.**

#### ● THE AMERICAS

Revenue, membership, and the total number of clubs all increased in the U.S. from 2016 to 2017. Revenue grew from \$27.6 billion in 2016 to \$30 billion in 2017, while membership increased from 57.2 million to 60.9 million. The U.S. club count rose from 36,540 locations to 38,477 sites.

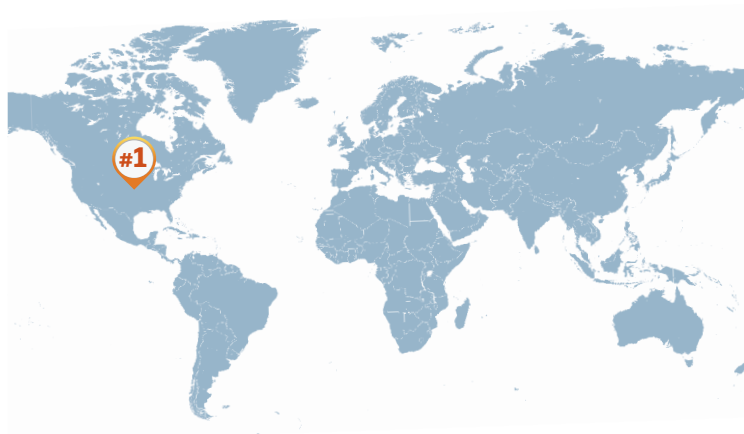
*The IHRSA Canadian Health Club Report* indicates that club operators serve nearly 6 million members at roughly 6,000 facilities in Canada. IBISWorld, an independent industry research firm, projects that revenue from gyms and health clubs in Canada will increase through 2019. One of the key drivers for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

The Latin American health club market is robust with potential for growth. Based on data gathered in *The IHRSA Latin American Report* (Second Edition), Brazil's 34,000 health clubs ranks the country second only to the U.S. among global fitness markets. More than nine million Brazilians are members of a health club. With more than 12,000 health club facilities, Mexico ranks second in Latin America and third worldwide in terms of number of clubs. Opportunities for growth exist in Latin America as member penetration rates remain low at an average of 2.15% across 18 countries.

## TOP 10 GLOBAL MARKETS

**NUMBER OF MEMBERS** The top 10 countries account for **70%** of the world's health club members.

United States	60,866,000
Germany	10,610,000
United Kingdom	9,720,000
Brazil	9,600,000
France	5,710,000
Canada	5,614,500
Italy	5,320,000
Spain	5,200,000
China (Mainland-Top 10 Cities)	4,520,000
Japan	4,240,000



**TOTAL TOP TEN: 174 MILLION**

## TOP 10 GLOBAL MARKETS

**MEMBERSHIP PENETRATION RATES**

Sweden	21.4%
Norway	20.9%
United States	20.3%
Denmark	18.3%
Netherlands	17.0%
Finland	16.8%
Canada	15.5%
Australia	15.3%
United Kingdom	14.8%
New Zealand	13.6%



## 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](http://healthclubs.com).



Indicates membership in the IHRSA Industry Leadership Council. Visit [ihrsa.org/industry-leadership-council](http://ihrsa.org/industry-leadership-council) to learn more.

### 24 HOUR FITNESS USA, INC.

[www.24hourfitness.com](http://www.24hourfitness.com)



#### Corporate Headquarters:

San Ramon, CA  
USA

#### Number of Clubs:

2017: 433

#### Number of Members:

2017: 3,540,000

**Principals:** AEA Investors LP, Ontario Teachers' Pension Plan, Fitness Capital Partners

**CEO:** Chris Roussos

#### President:

Frank Napolitano

**Markets Served:** USA

### 360 FITNESS (CANADA)

[www.360fitness.ca](http://www.360fitness.ca)

#### Corporate Headquarters:

Red Deer, AB  
Canada

#### Number of Clubs:

2017: 3  
2016: 3

#### Number of Members:

2017: 692  
2016: 695

**Principals:** Jack Wheeler, Don Stirling, Brooke Einarson-Schaab



**CEO:** Jack Wheeler

**Markets Served:** Canada

#### Revenues:

2017: \$1,851,852  
2016: \$1,814,815

### 360 FITNESS (COSTA RICA)

[www.360fitness.co.cr](http://www.360fitness.co.cr)

#### Number of Clubs:

2017: 4

**CEO:** Kristha Serrano

**Markets Served:** Costa Rica

### 360TC

[www.360tc.se](http://www.360tc.se)

#### Corporate Headquarters:

Skelleftea, Sweden

#### Number of Clubs:

2017: 4

#### Number of Members:

2017: 2,300

**CEO:** Patrik Nygren

**Markets Served:** Sweden

### 3T

[3t.no](http://3t.no)

#### Corporate Headquarters:

Trondheim, Norway

#### Number of Clubs:

2017: 17

#### Number of Members:

2017: 39,000



**CEO:** Hilde Holck

**Markets Served:** Europe

### 9ROUND

[www.9round.com](http://www.9round.com)

#### Corporate Headquarters:

Littleton, MA  
USA

#### Number of Clubs:

2017: 600+ (mainly franchised)  
2016: 497 (mainly franchised)



**CEO:** Shannon Hudson

**Markets Served:** USA, International

### AALST SSDLA R.L. (TRADE MARK SPORTSMAN CLUB)

[www.sportsman-club.it](http://www.sportsman-club.it)

#### Corporate Headquarters:

Milan, Italy

#### Number of Clubs:

2017: 1

#### Number of Members:

2017: 1,200

#### Principal:

Claudio Andrea Grosso

**CEO:** Claudio Andrea Grosso

**Markets Served:** Italy

### AB LL INTERNATIONAL (LADY LINE, EASYFIT)

[www.lli.fi](http://www.lli.fi)

#### Corporate Headquarters:

Finland

#### Number of Clubs:

2017: 57

#### Number of Members:

2017: 65,000

**Markets Served:** Finland

#### Revenues:

2017: \$31,419,285

### ACAC FITNESS AND WELLNESS CENTERS

[www.acac.com](http://www.acac.com)



#### Corporate Headquarters:

Charlottesville, VA  
USA

#### Number of Clubs:

2017: 13