



GSP 2002. HEALTH AND FITNESS CLUBS. GERMANY.

TABLE OF CONTENTS	i-ii
SYNOPSIS	1
SECTION 1 NUMBER OF CLUBS AND MEMBERS	2
Table 1 Market outlook sales and members (2001-2006)	2
New openings	2
Chains/local gyms	2
Table 2 Berlin market (2002)	3
Regional variations	3
Competition	3
Table 3 Growth drivers	3
Germans are becoming more health conscious	3
Ageing population and insurers	3
SECTION 2 MAJOR PLAYERS and MARKET SHARE	4
Table 4 Leading clubs in Germany	4
Table 5 Leading companies, ranked	4
Company profile Swiss Training	5
Company profile TC Holdings	5
Company profile Elixia/Balance Group (UK/USA)	6
Company profile Fitness First	6
Company profile Holmes Place	7
SECTION 3 HEALTH CLUB BUSINESS	7
Table 6 Changes in demand (sales and members), 2001	7
Table 7 Future changes in demand (sales and members)	7
Factors growing sales in clubs	8
Table 8 Gender breakout of clients	8
Table 9 Consumer profiles, age and lifestyle	8
Niche consumer segments	8
Table 10 Facilities and services offered	8
Typical facilities and services	9
Two main consumer segments	9
Machines	9
Specialise	9
Individual attention	9
Table 11 Number of trainers	9
Wellness menus	10
Movement classes	10
Water relaxation	10
Table 12 Facilities use ranked	10
Table 13 Sources of club income (2002) ranked	10
Table 14 Ancillary sources of income	11
Table 15 Membership renewal rates	11
Table 16 % of contracts for 12 months	11



Section 4 PRICES AND PRICING TRENDS	12
Table 17 Fees (a month for 12 month contract), and % change	12
Table 18 Fees (euro) other than 12 month contract	12
Table 19 Fees in selected clubs (Euro)	13
Table 20 Club membership fees a year 2001 by area (DM)	13
APPENDIX Accepted definitions of club sizes	13
Table 21 Clubs, members, sector sales from 1990 -2000	13
Table 22 Average members and sales, per club (1999-2000)	14
Table 23 % distribution of clubs by size	14
Table 24 Members and income per club, by club size	14
Table 25 Size (m2), per club	14
One member per m2	15
Typical installed facilities in clubs by size	15
Trade associations	15
Trade conferences	15
Trade publications	15
Bodylife/Emnid survey	15
SECTION 5 PROFILES OF PARTICIPANTS	16
Table 26 Profile of sample, ranked by size	16
Table 27 Profile of participants	16
INDEX	17