



GSP 2002. HEALTH AND FITNESS CLUBS. ITALY.

TABLE OF CONTENTS	i-ii
SYNOPSIS	1
SECTION 1 NUMBER OF CLUBS AND MEMBERS	2
Table 1 Number of clubs and members (2001)	2
Table 2 Expected change membership Italy (2002)	2
Table 3 Market potential/outlook (2004-2006)	3
Growth continues	3
New openings no incremental growth	3
Fewer but bigger	3
Table 4 Distribution of clubs, % by region	4
Table 5 Market positives, ranked	4
Quality	4
Better and more services	5
Expand club size	5
Sports/leisure	5
Table 6 Market negatives, ranked	5
Table 7 Market negatives, identified by clubs	5
Economy/September 11	5
Time-pressed consumers	5
Competition	6
Overhead costs	6
Table 8 Consumer profiles, age and gender	6
Age and health related services	6
Insurance paid services	7
Frequency of visits	7
SECTION 2 MAJOR Players and MARKET SHARE	7
Table 9 Leading companies	7
Table 10 Companies ranked by size	7
Fragmented market	8
Chains vs independents	8
Fitness First (UK)	8
Other international chains	8
Tonic	8
Milan clubs	9
Florence clubs	9
Rome clubs	9
Other clubs named	9
Technogym	9
SECTION 3 HEALTH CLUB BUSINESS	10
Table 11 Past changes in demand, 2001	10
Table 12 Forecast % changes in club business (2003/02)	10
Table 13 Facilities / services offered in clubs	11
Table 14 Facilities/services use ranked	11



Machines and classes	11
Body builders and health seekers	11
Women and machines	12
Seasonal variations in use	12
Table 15 Sources of club income (2002) ranked	12
Table 16 Ancillary sources of income	13
Table 17 Changes in sources of income, ranked	13
Fees and ancillary	13
Personal trainers	13
Regional differences	13
Water zones	14
Table 18 Membership % renewal rates	14
Section 4. PRICES AND PRICING TRENDS	15
Table 19 Fees, by market segment	15
Table 20 Fees in selected cities, independent clubs	15
Secrecy/bargaining	15
Table 21 Fees and access hours	16
Short and long term contracts	16
Joining fees rare	16
Table 22 Fee increases	16
APPENDIX Accepted definitions of club sizes	17
Table 23 Number of clubs, by size of outlet	17
Table 24 Number of members per club	17
Table 25 Income per club (Euro a year)	17
Income per square meter	17
Start up costs	18
Table 26 Size (m2) per club	18
Typical club facilities	18
Unregulated fitness sector in Italy	18
Trade associations	19
SECTION 5. PROFILES OF PARTICIPANTS	19
Table 27 Profile of sample, by type	20
Table 28 Profile of participants	20
INDEX	21