

BUILDING UPON STRONG PERFORMANCE IN LEADING MARKETS, THE GLOBAL HEALTH CLUB INDUSTRY POSTED SOLID GROWTH IN 2013

By Melissa Rodriguez



While economic growth remained uneven among global markets, the health club industry expanded as top markets recorded strong results. Growth was particularly significant for economic leaders in the Americas, Europe and Asia. Overall, the global health club industry generated \$78 billion in revenue in 2013. More than 160,000 clubs attracted nearly 140 million members worldwide.

THE AMERICAS

In the U.S., the health club industry posted growth in revenue as well as number of club locations and memberships. While revenue and club count increased modestly, membership rose significantly. Revenue grew to \$22.4 billion from \$21.8 billion in 2012, and club count increased to 32,150 from 30,000. More than 54 million Americans belonged to a health club, up 8% from 2012, when 50.2 million were members.

According to *The IHRSA Canadian Health Club Report*, club operators serve nearly six million members at roughly 6,000 facilities in Canada. Results from IHRSA's Canadian health club survey show that although a sample of clubs posted marginal revenue growth of 0.5% from 2011 to 2012, growing consumer interest in non-dues revenue services may fuel future growth. Based on the OECD's Better Life Index, Canada ranks high in measures of well-being, providing club operators and developers with an ideal marketplace for health and fitness offerings.

In Latin America, Brazil continues to show strong performance as the leading health club market in the region. Also a global leader, Brazil's revenue totals more than \$2 billion from over 30,000 clubs with 7.7 million members. *The IHRSA Latin American Report* shows that opportunities for growth lie ahead in Latin America as member penetration rates remain low in comparison with more developed markets.

EUROPE

The IHRSA European Health Club Report shows that 44 million members belong to more than 48,000 health clubs in Europe, which combine for annual revenues of \$32.9 billion. The European health club market is the most profitable region observed, maintaining the greatest number of clubs and generating the most revenue. Although Ireland, Greece, Portugal, and Spain have struggled in recent years, the markets in Germany, Norway, and Poland have shown growth.

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TOP 10 GLOBAL MARKETS

INDUSTRY REVENUE (USD IN MILLIONS) The top 10 countries account for 75% of total industry revenue.

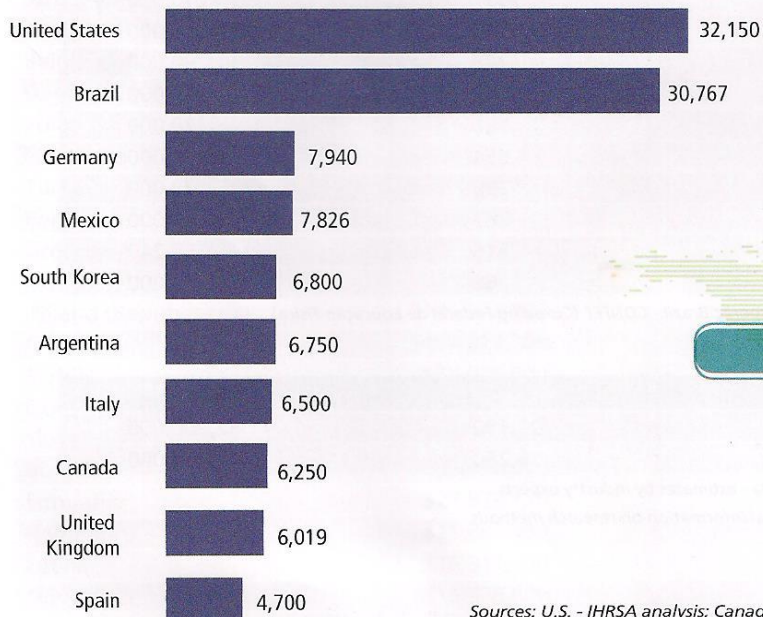


TOTAL TOP TEN = \$58,625

Sources: USA - IHRSA analysis; Canada - industry experts; Asia-Pacific: The 2011 IHRSA International Report; Europe - The European Health Club Report, The Leisure Database, DSSV; Latin America-The IHRSA Latin American Report, Estimates by Industry Experts

TOP 10 GLOBAL MARKETS

NUMBER OF CLUBS The top 10 countries account for 70% of the world's health clubs.

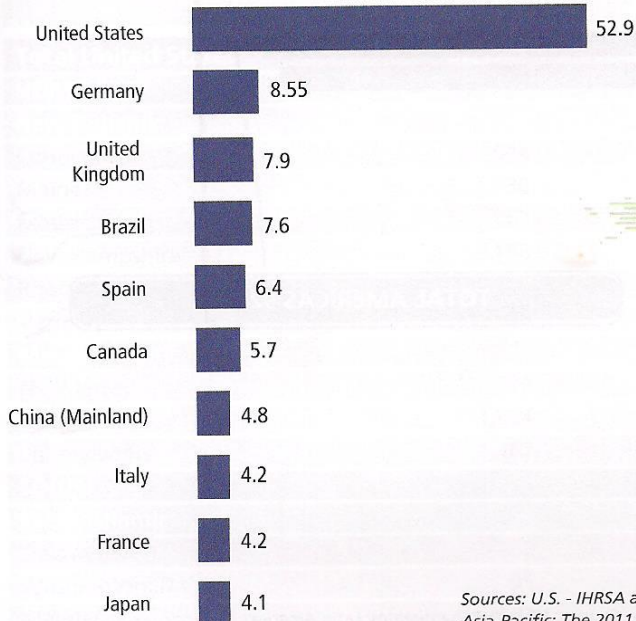


TOTAL TOP TEN = 115,702

Sources: U.S. - IHRSA analysis; Canada - Estimates by industry experts; Asia-Pacific: The 2011 IHRSA International Report; Europe - The 2010 European Health Club Report, The Leisure Database, DSSV; Latin America-The IHRSA Latin American Report, Estimates by Industry Experts

TOP 10 GLOBAL MARKETS

NUMBER OF MEMBERS (IN MILLIONS) The top 10 countries account for 77% of the world's health club members.

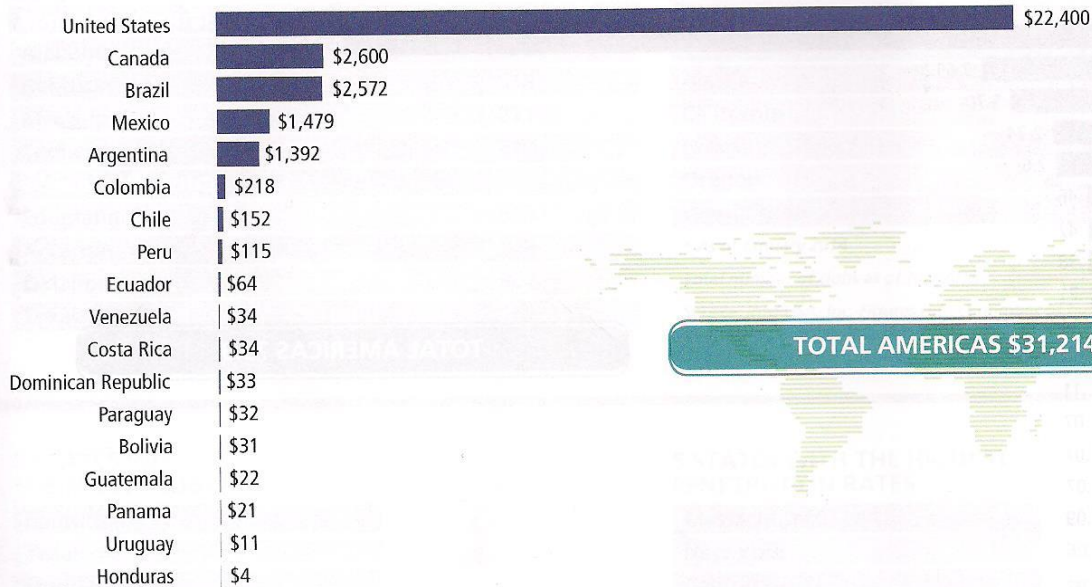


TOTAL TOP TEN 106.7 MILLION

Sources: U.S. - IHRSA analysis; Canada - Estimates by industry experts;
 Asia-Pacific - The 2011 IHRSA International Report;
 Europe - The 2010 European Health Club Report, The Leisure Database, DSSV

THE AMERICAS

INDUSTRY REVENUE (USD IN MILLIONS)

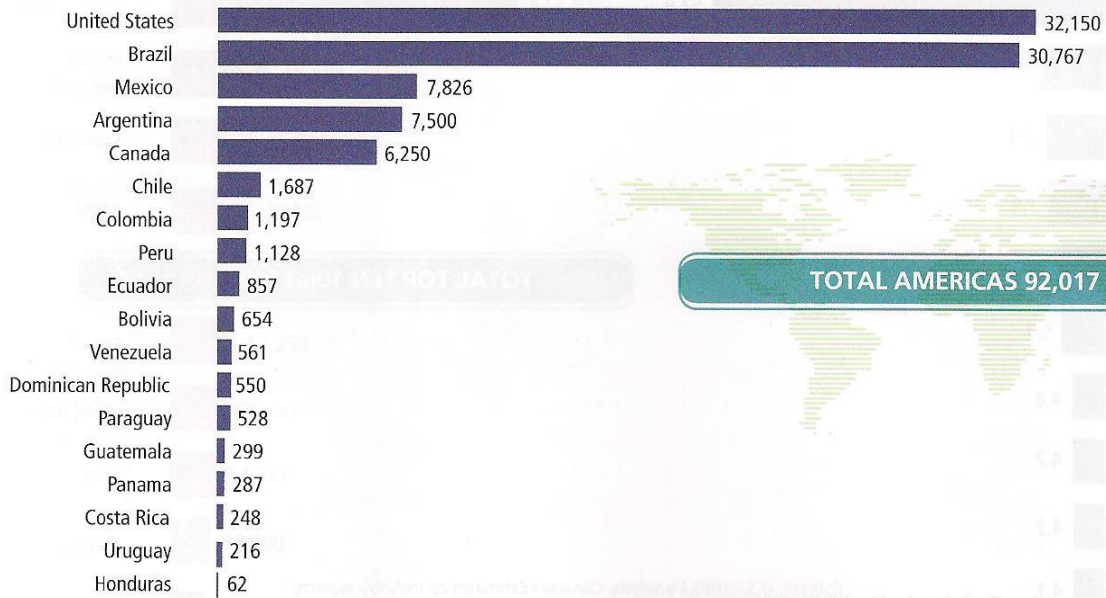


TOTAL AMERICAS \$31,214

Sources: USA - IHRSA estimates; Latin America -
 The IHRSA Latin American Report - Estimates by industry experts;
 Canada - Estimates by industry experts

THE AMERICAS

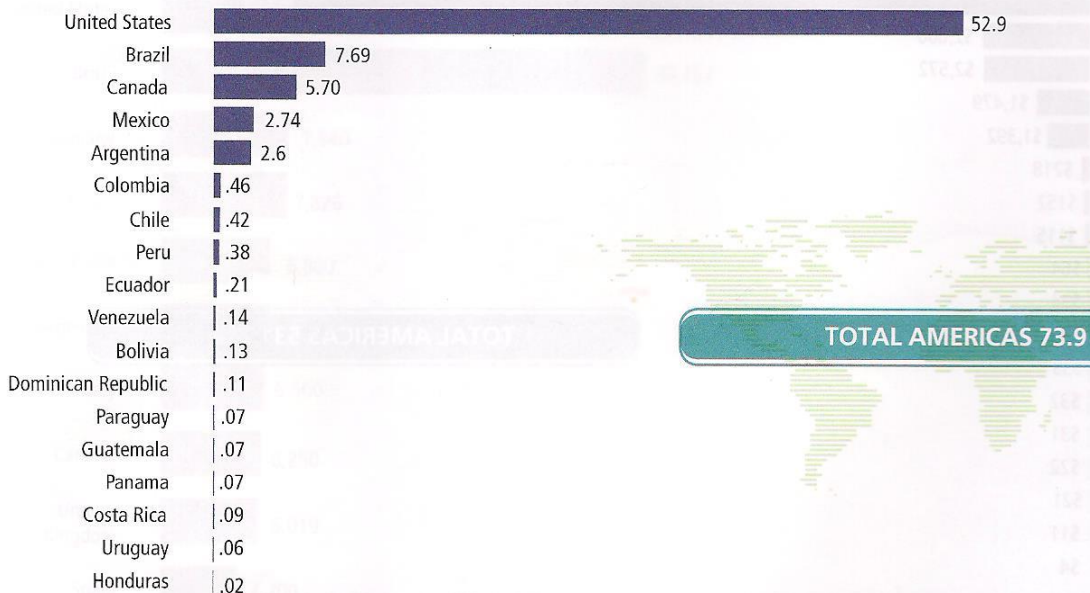
NUMBER OF CLUBS



Sources: USA - IHRSA estimates; Latin America - The IHRSA Latin American Report - Estimates by industry experts; Canada - Estimates by industry experts

THE AMERICAS

NUMBER OF MEMBERS (IN MILLIONS)



Sources: USA - The IHRSA Health Club Consumer Report; Latin America - The IHRSA Latin American Report - Estimates by industry experts; Canada - Estimates by industry experts