


edelhelfer



Personal Training in Europe


European Health and Fitness Forum
Cologne, 11th April, 2018

A personal trainer in a white shirt is assisting a client in a gym. The client is wearing a white tank top and black shorts, and is performing a pull-up or similar exercise. The background shows a blurred gym environment with windows and other people.

*“We believe **Personal Training** is and will continue to be in increasing demand by the market. [...] Whatever members want to join a gym or health club for, they are looking for tangible results and **Personal Training** undoubtedly helps them achieve their goals.”*

(John Treharne, CEO of The Gym Group, 607,000 members in the UK)

Picture: Personal Trainer Bardo Tschapke, EVO Fitness Düsseldorf



*“The increase of other revenue was largely due to the higher sales of day passes and further rollout of the **Personal Trainer** offering. We have **Personal Trainers** available in most of our clubs outside France and will start to make these trainers available in France in 2018. We now have self-employed **Personal Trainers** in nearly 300 clubs.”*

(Basic-Fit, 1.52m members in five countries)

Picture: Personal Trainer Bardo Tschapke, EVO Fitness Düsseldorf

Fitness World's growth strategy "Fuel19" includes:

INTENSIFIED GROWTH OF PERSONAL TRAINING

*"We have significantly improved our **Personal Training** business; however, there is an additional opportunity in the growing market for **Personal Training**, as demonstrated by our Scandinavian competitors."*

(Fitness World, 476,000 members in Denmark)

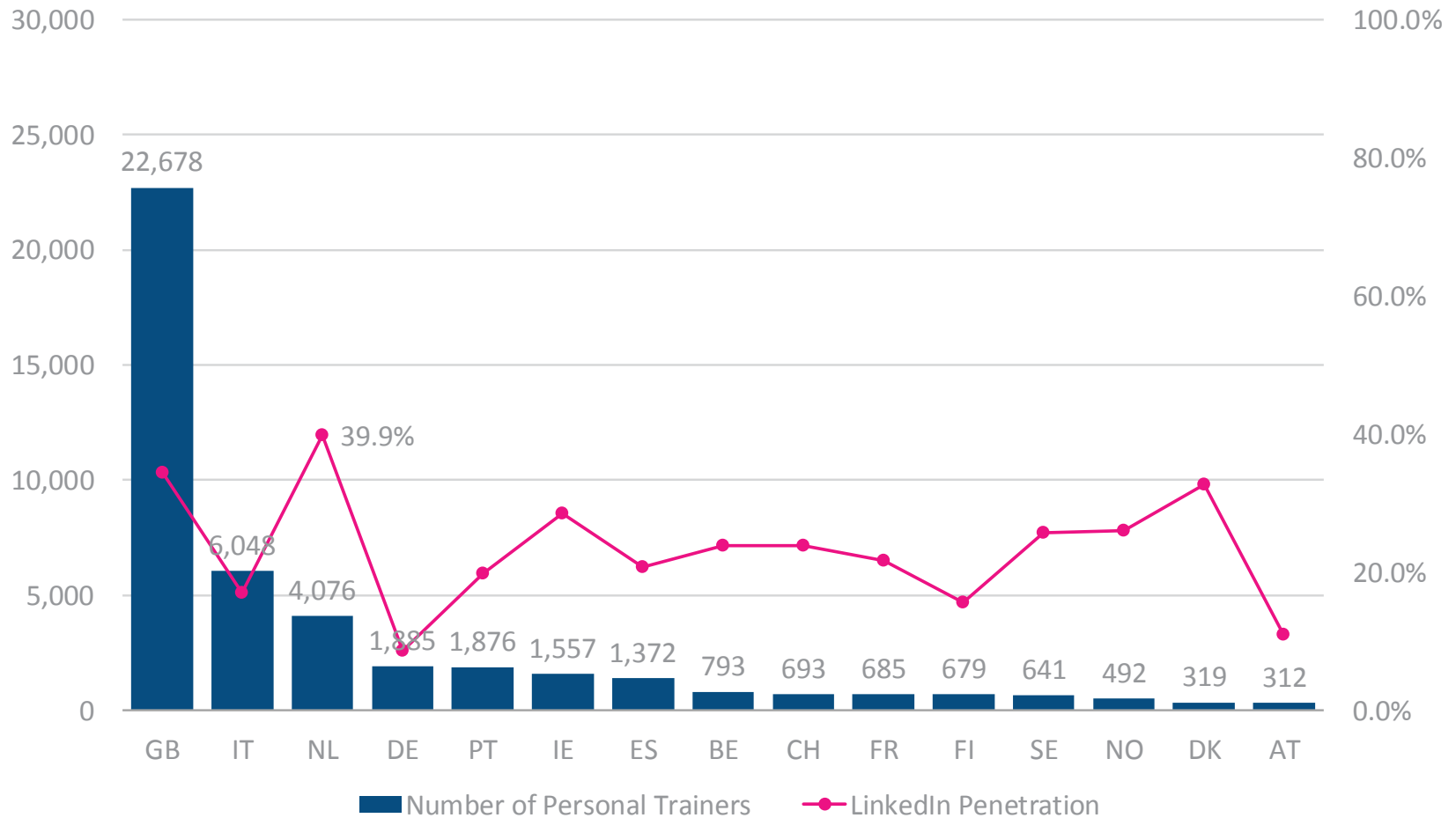
Picture: Personal Trainer Bardo Tschape, EVO Fitness Düsseldorf

Personal Training in Europe

LinkedIn: 44,100 Personal Trainers in 15

Countries

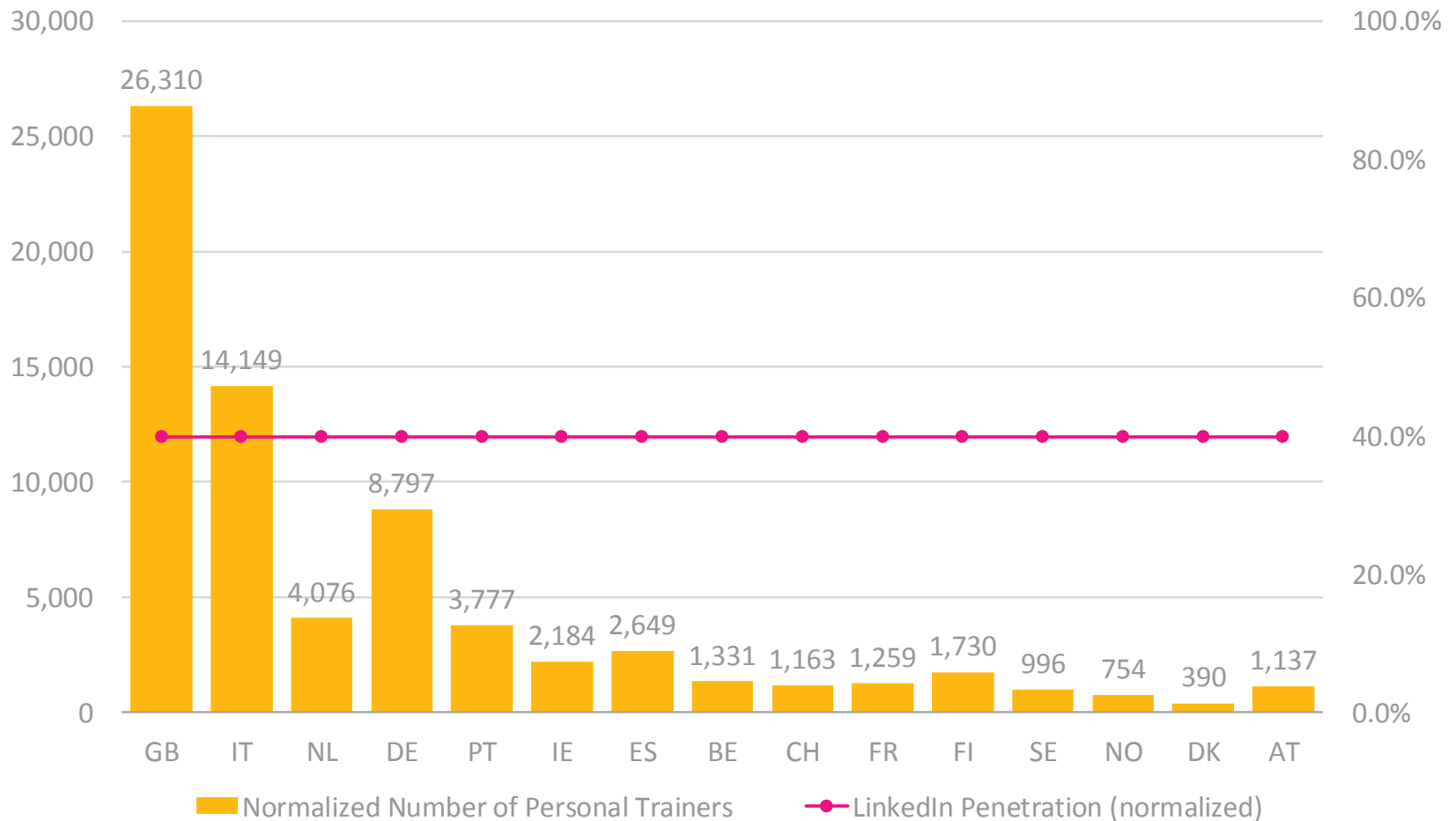
Number of Personal Trainers according to LinkedIn



Personal Training in Europe

“Normalized”: 70,700 Personal Trainers Active

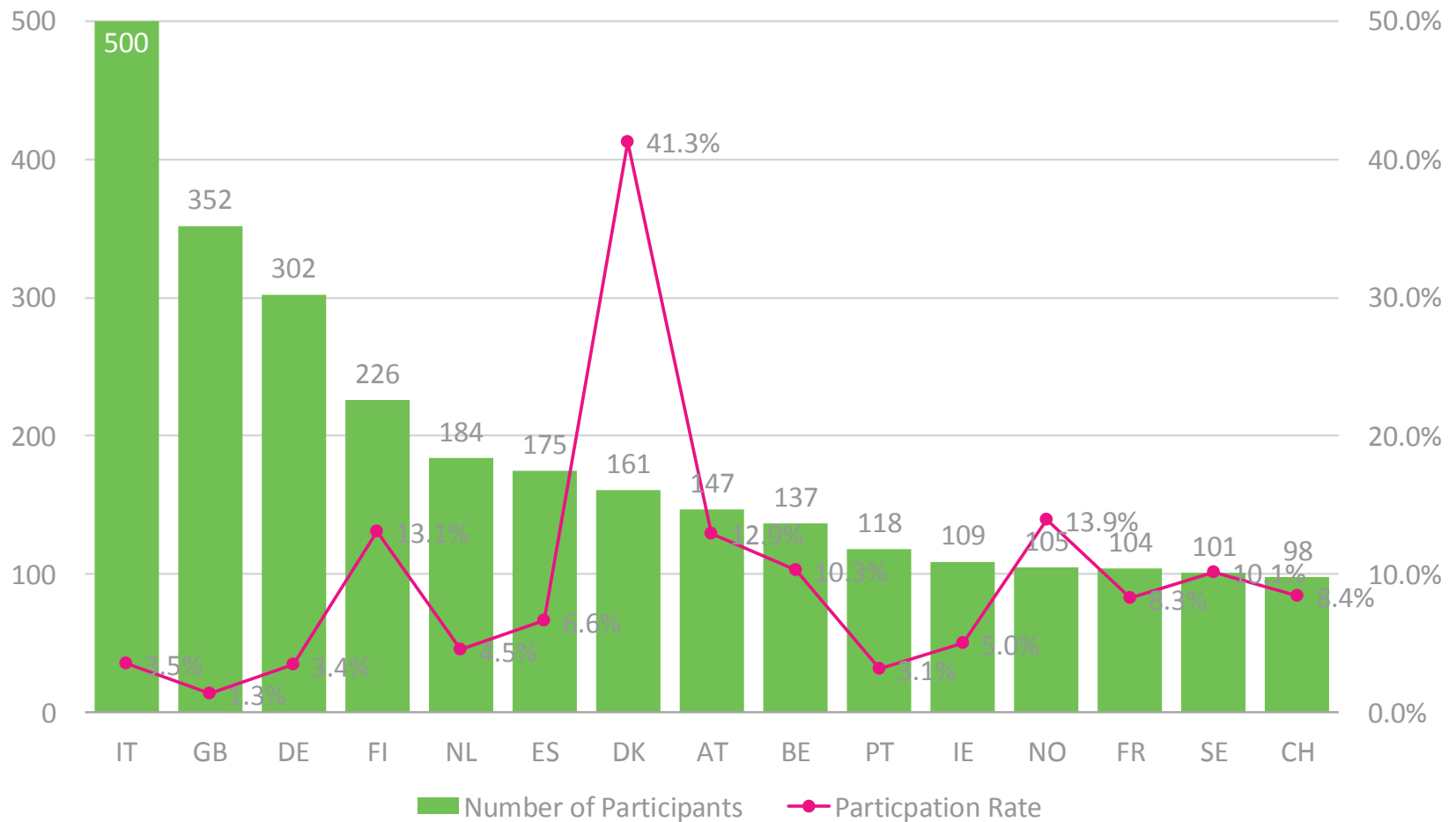
Number of Personal Trainers after normalization



Personal Training in Europe

3,000 Participating Personal Trainers

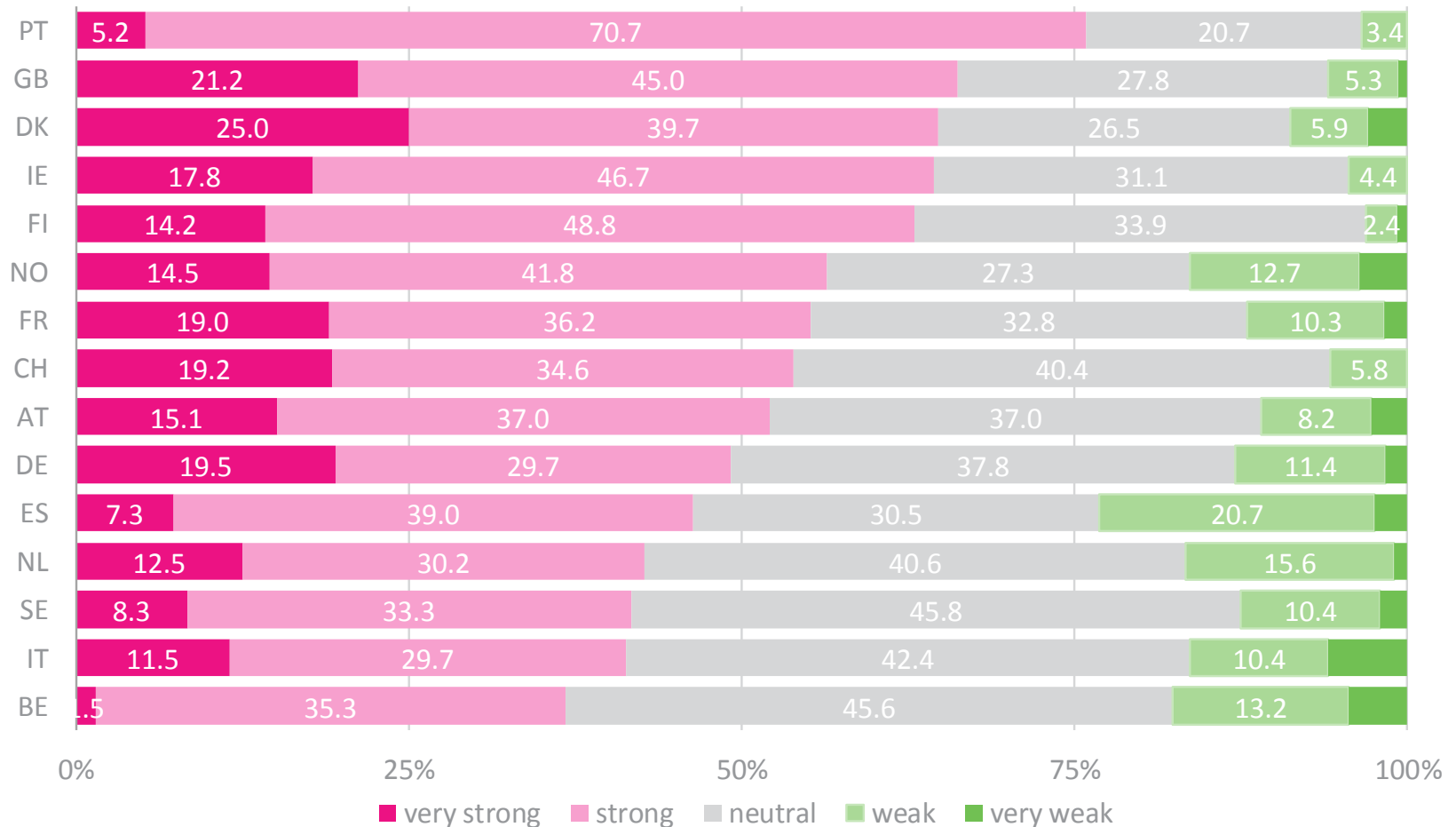
Number of participants in our survey



Personal Training in Europe

52.7% Assess the Current Competition as Strong

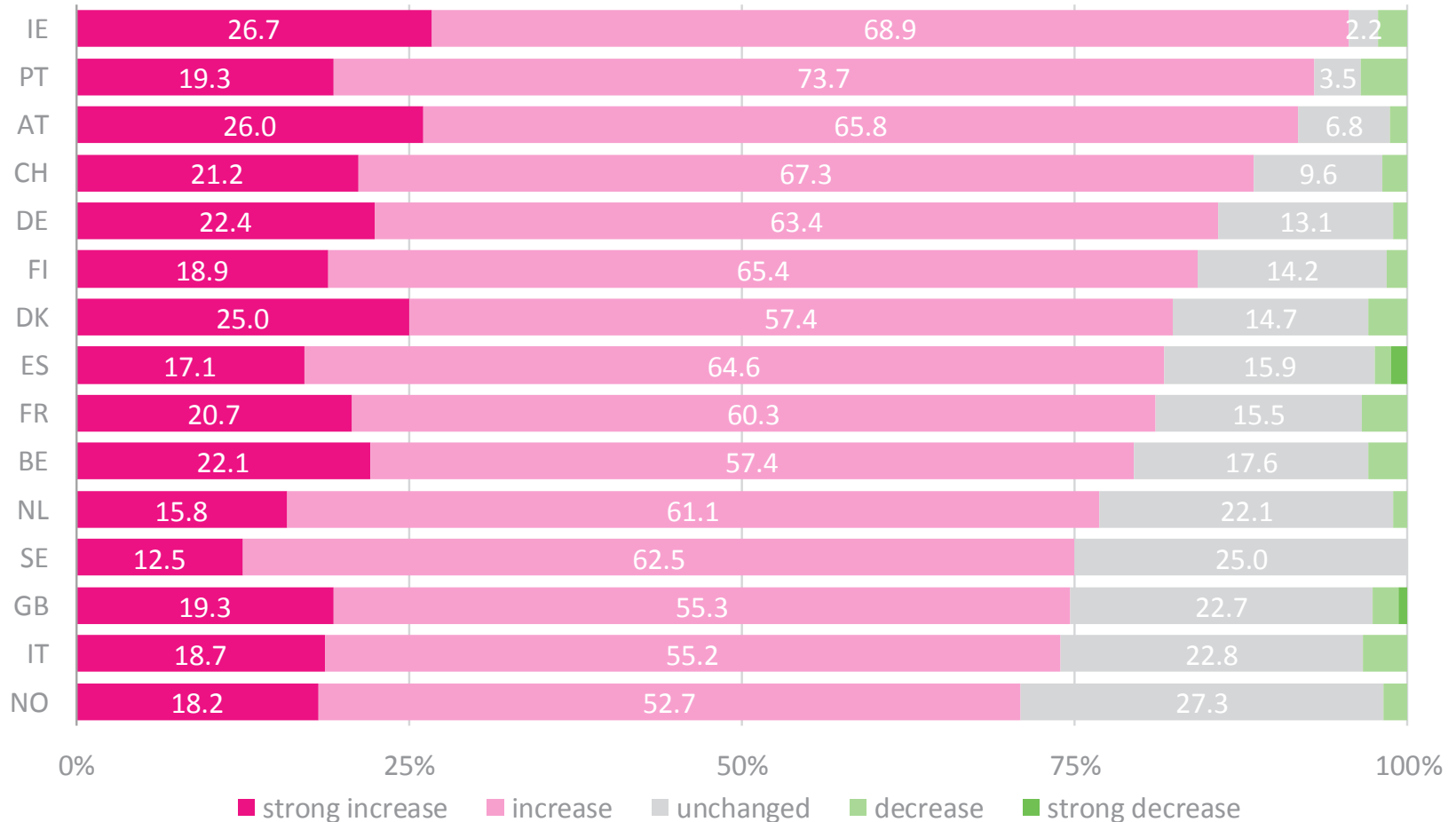
Assessment of the current competitive landscape




Personal Training in Europe

81.0% Expect the Competition to Grow

Prognosis for the competitive landscape





*A **Personal Trainer's** role includes designing, implementing and valuating exercise/ physical activity programmes for a range of individual clients by collecting and analyzing client information to ensure the effectiveness of personal exercise programmes.*

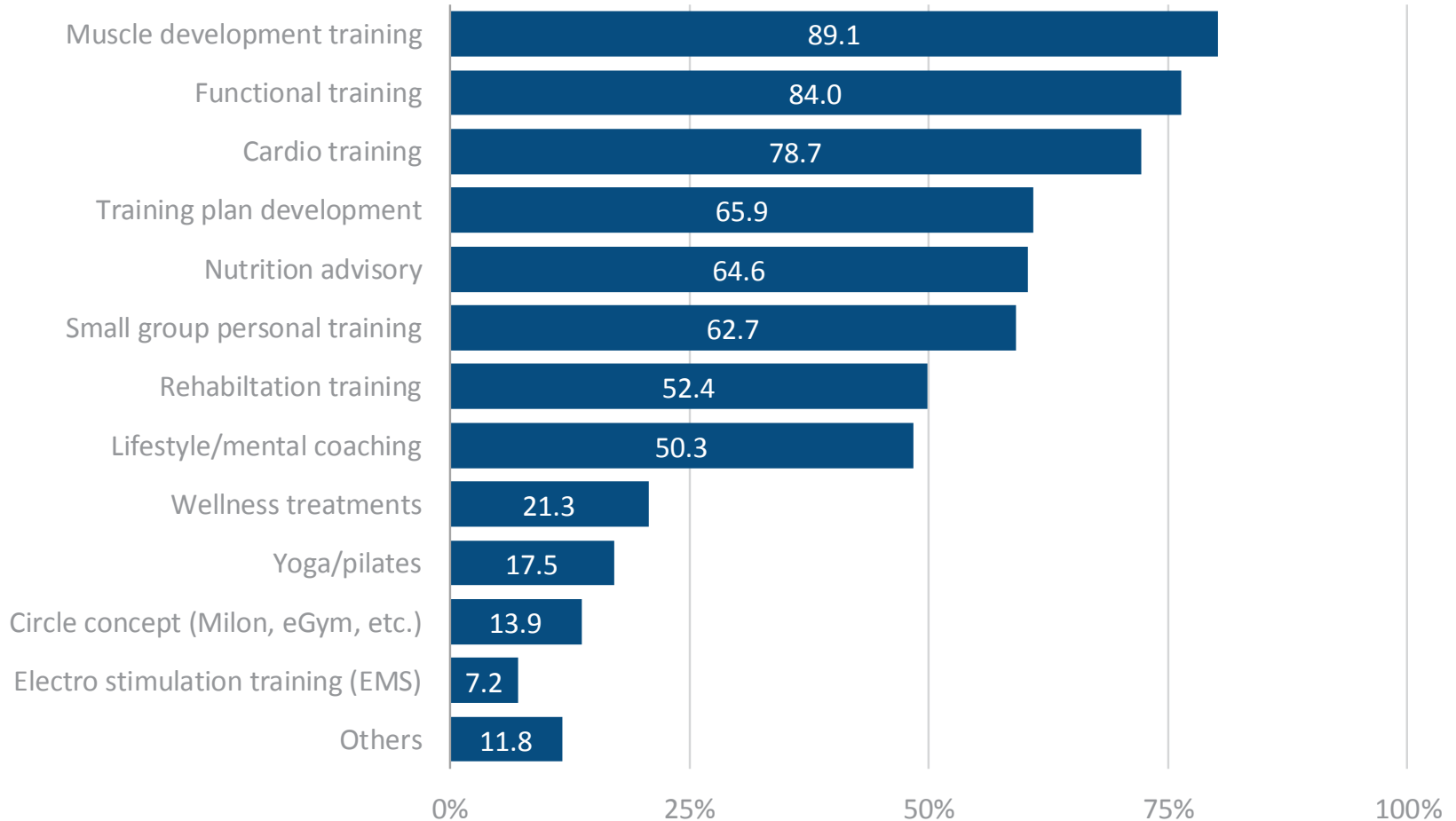
(EuropeActive 2011)

Picture: Personal Trainer Bardo Tschapke, EVO Fitness Düsseldorf

Personal Training in Europe

Offering Focused on Specific Services

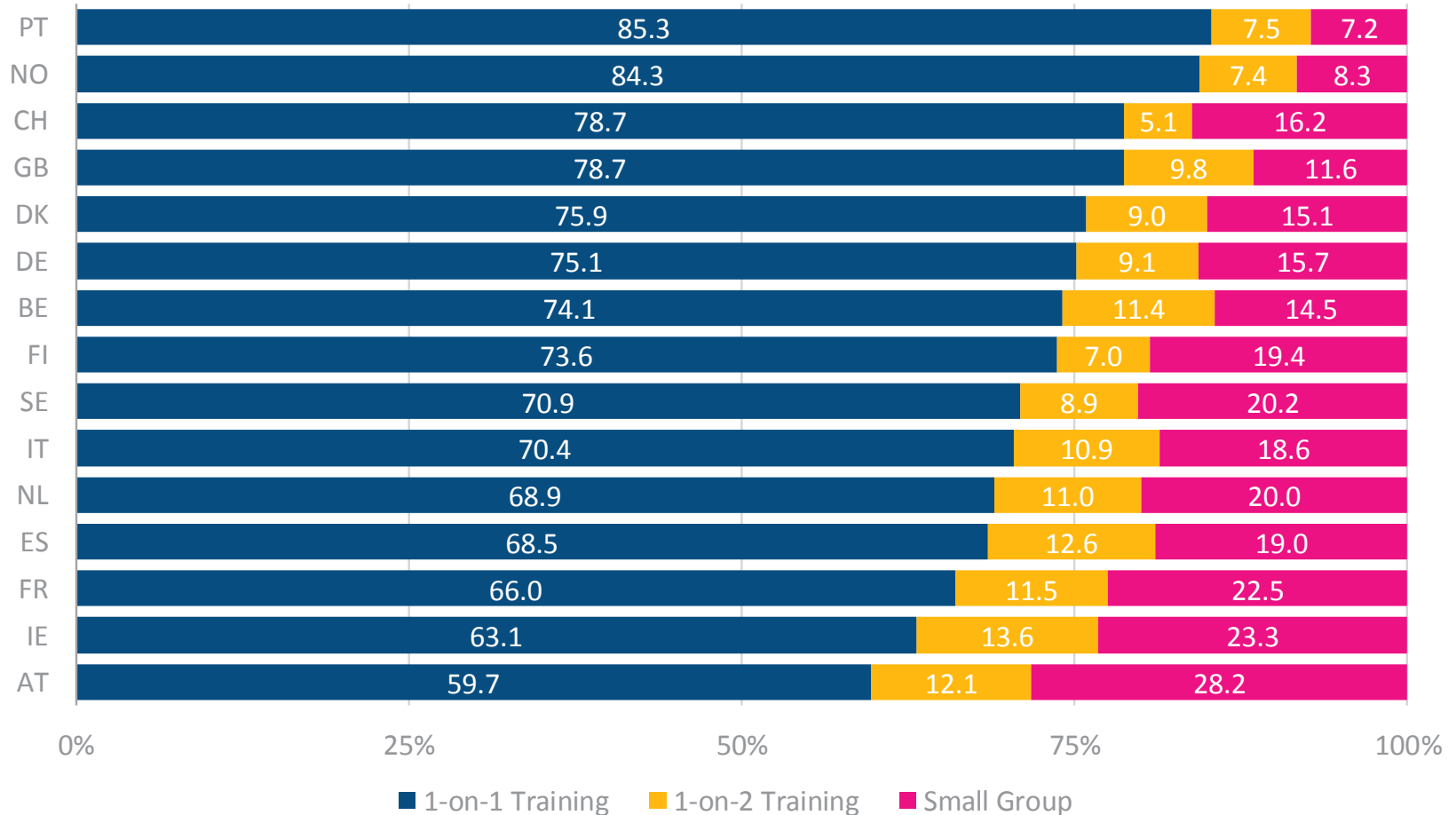
Individual Personal Training services



Personal Training in Europe

Majority of Sessions are 1-on-1

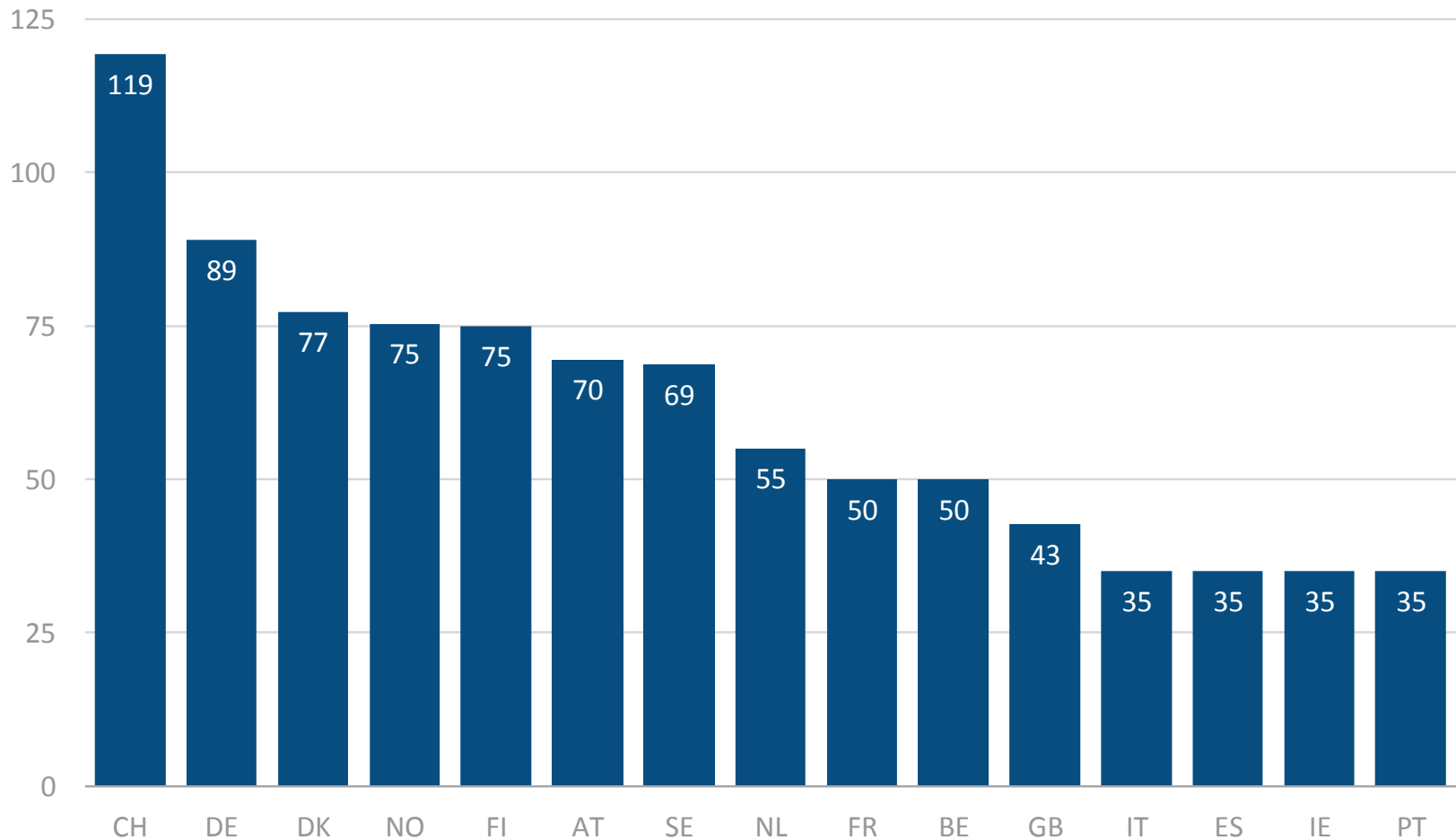
Organization of offering



Personal Training in Europe

Prices Vary Internationally

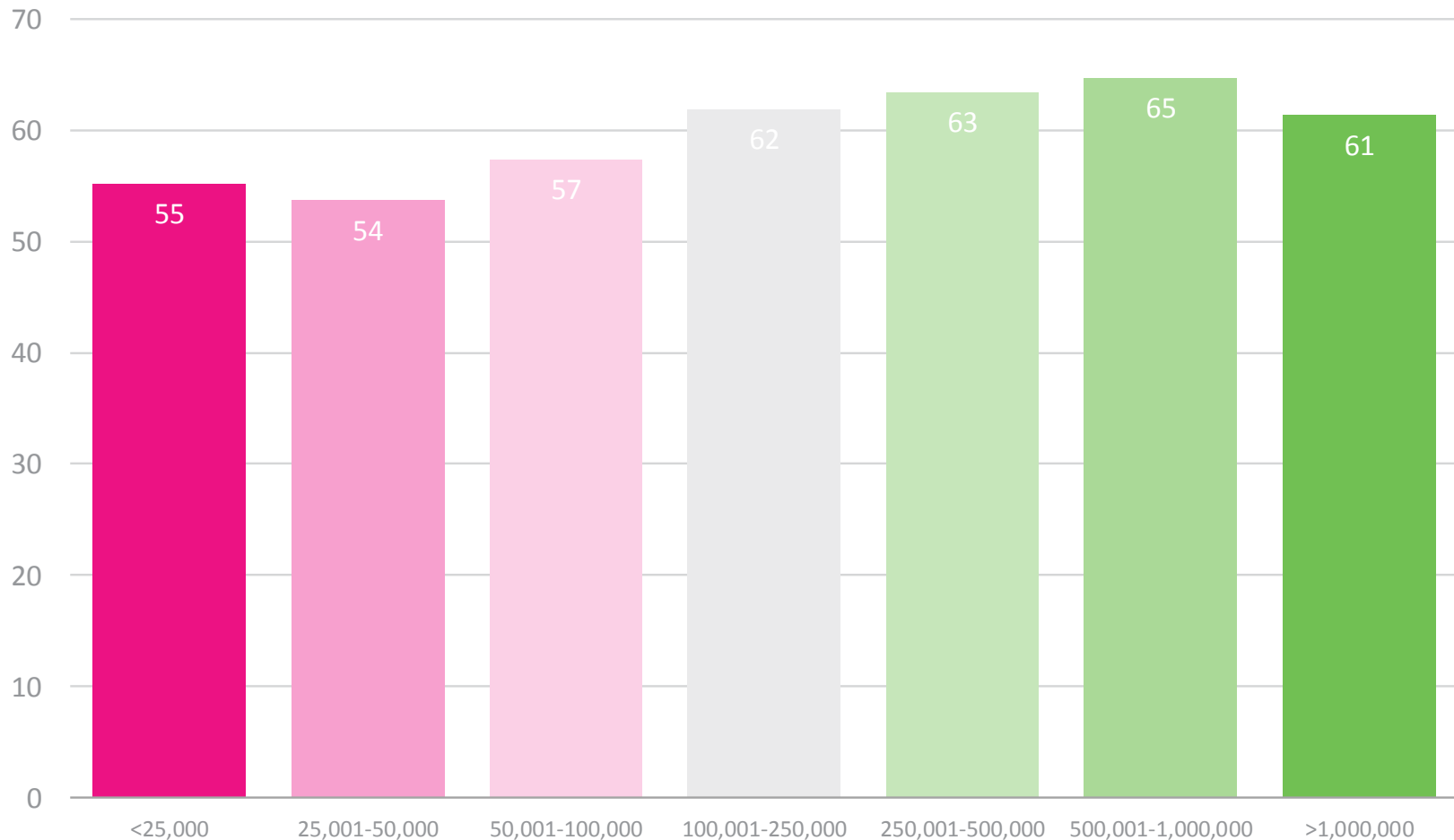
Prices for 1-on-1 training on national level (in EUR)



Personal Training in Europe

Location Affects Pricing

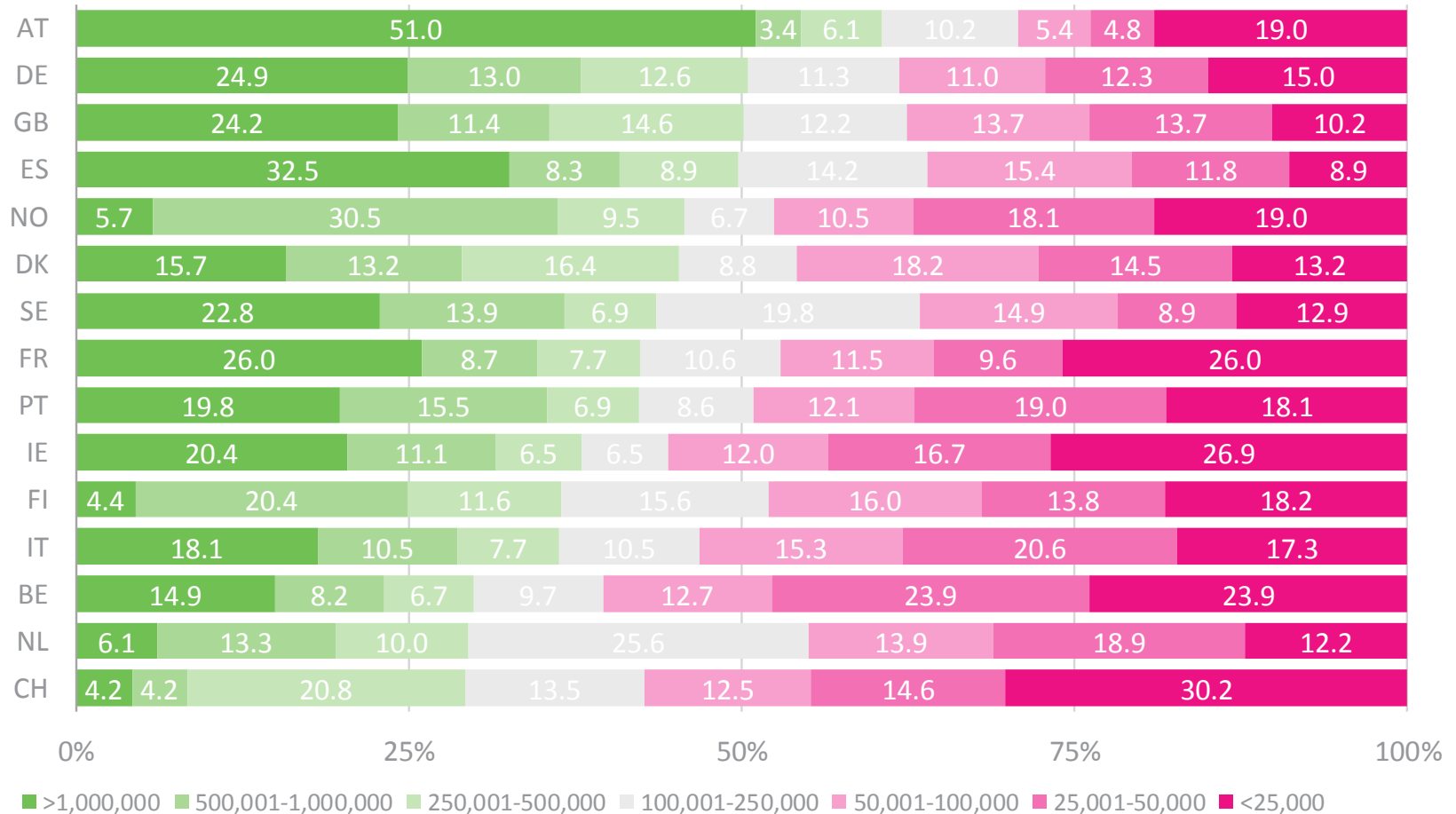
Prices for 1-on-1 training in relation to city size (in EUR)



Personal Training in Europe

Concentration in Major Cities

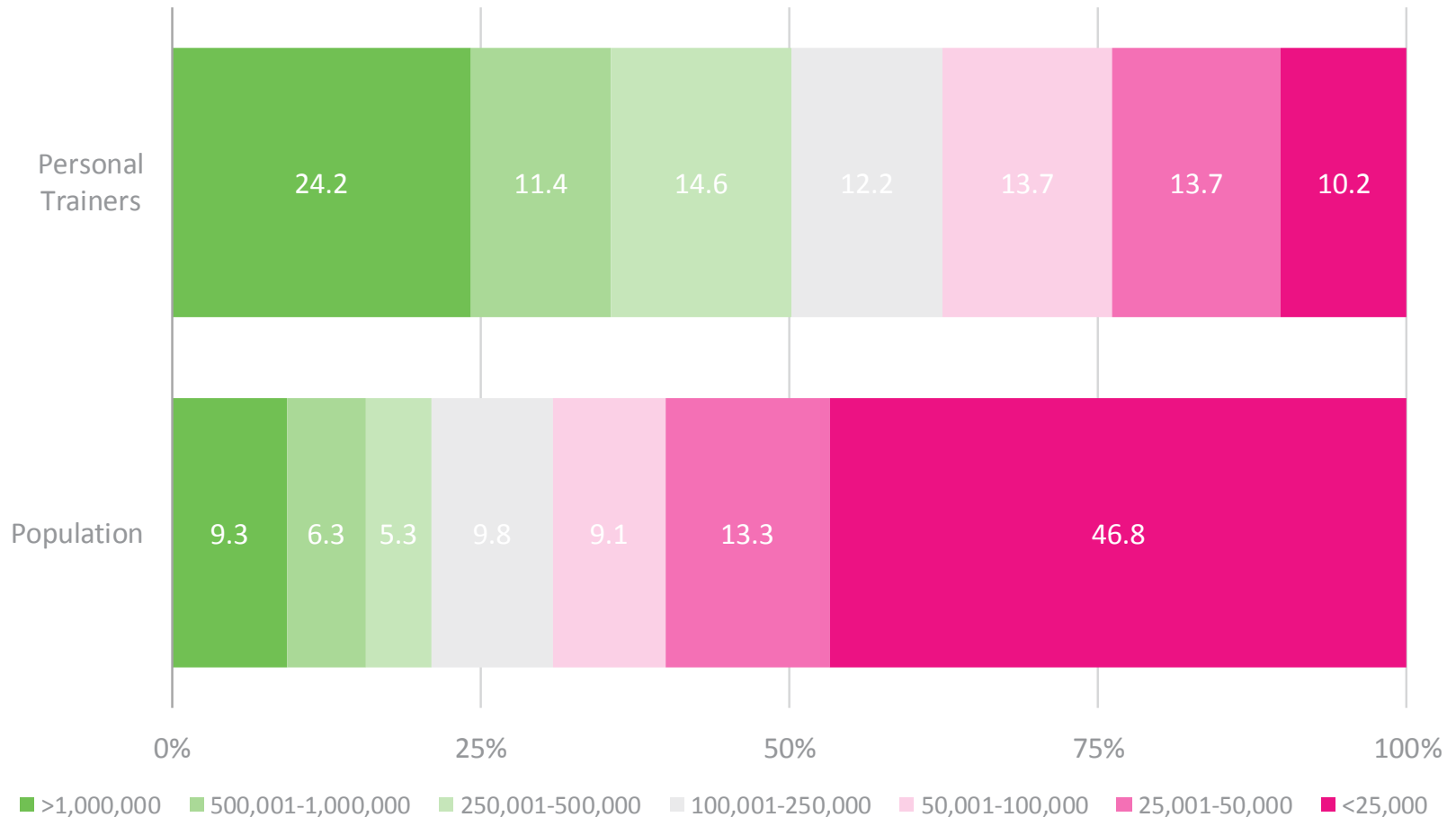
Location of work per city size



Personal Training in Europe

Personal Trainers and Population not Congruent

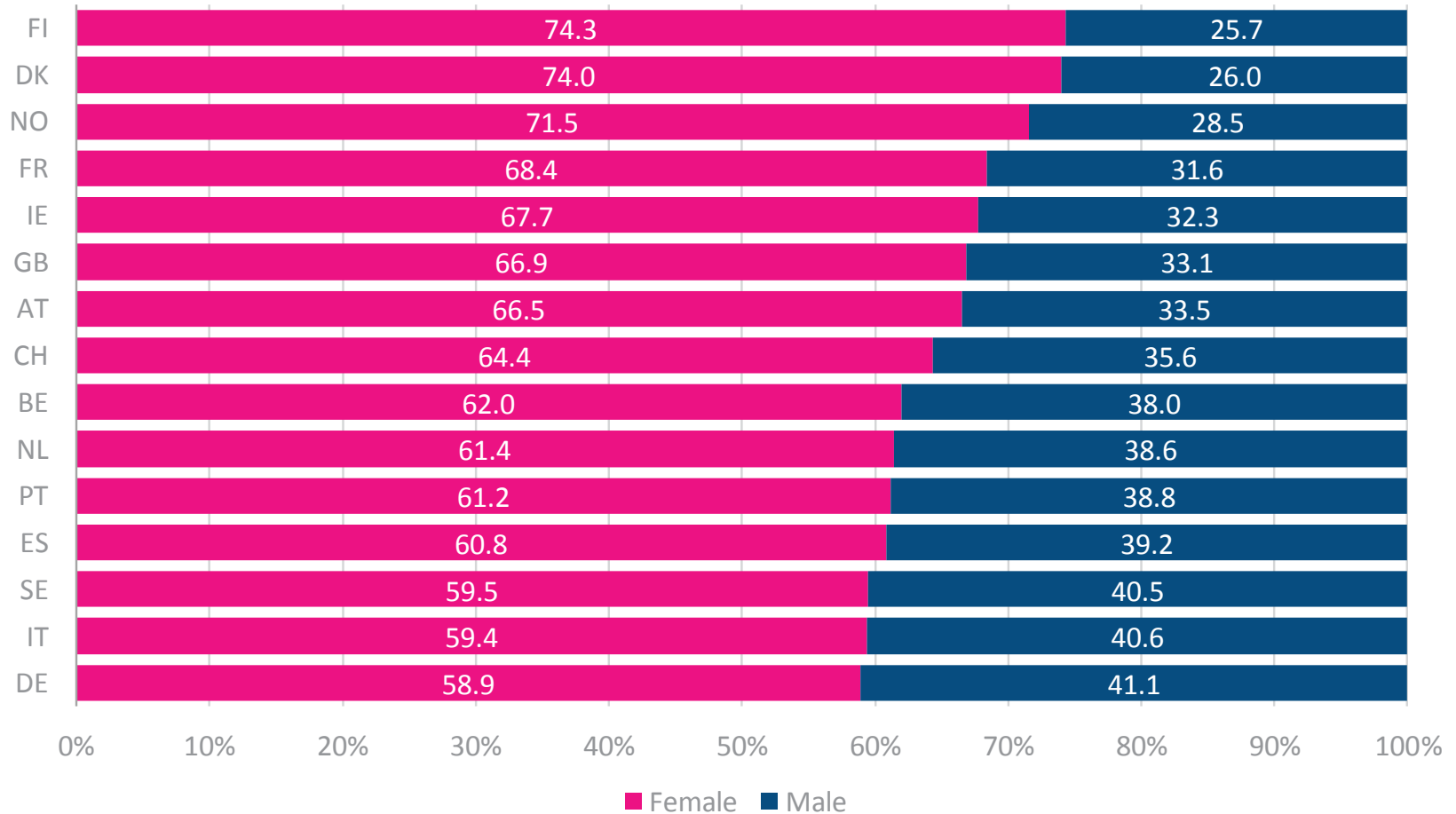
Distribution of Personal Trainers versus total population in Germany



Personal Training in Europe

2/3 of Clients are Female

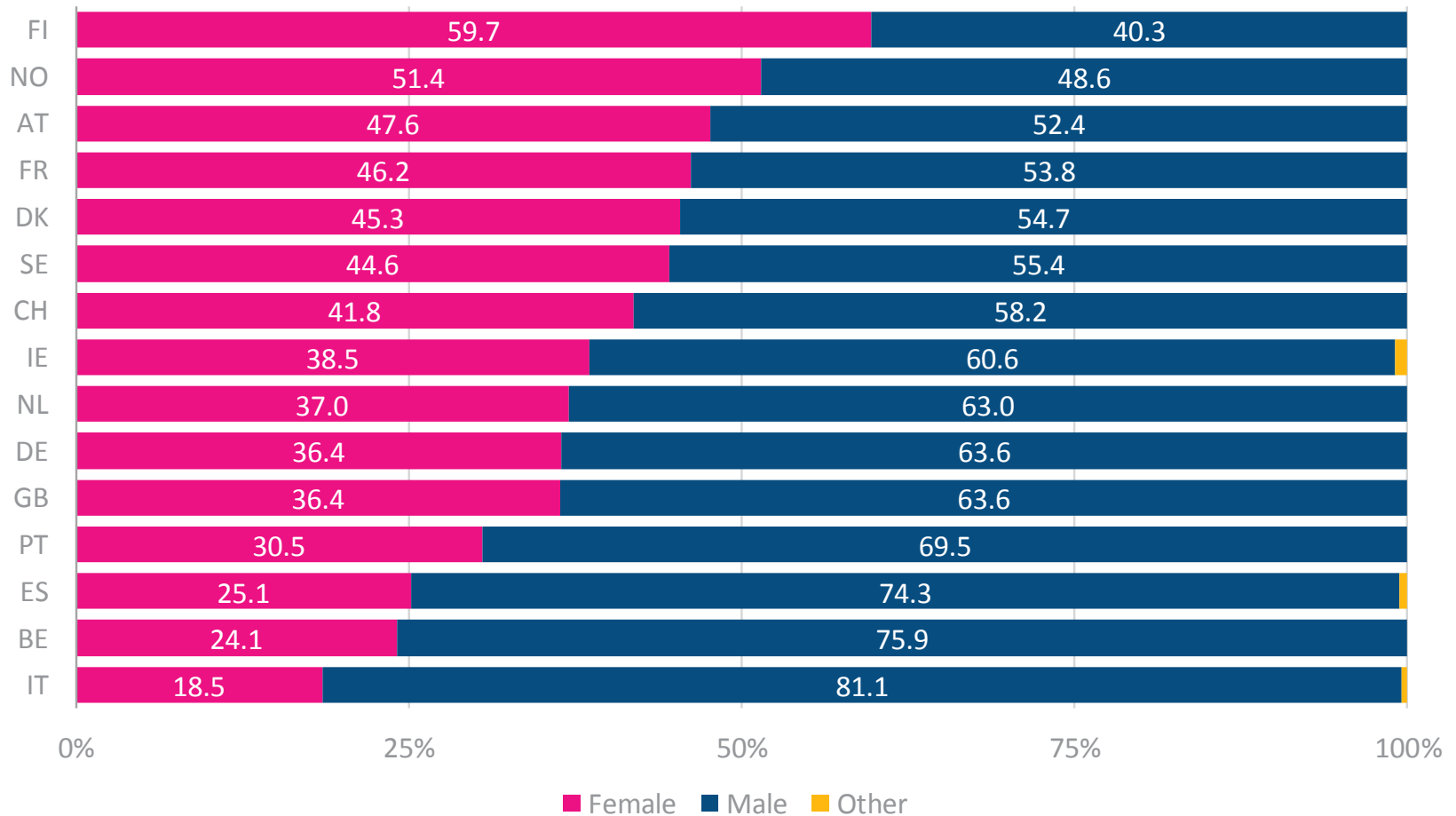
Portion of female Personal Training clients



Personal Training in Europe

2/3 of Personal Trainers are Male

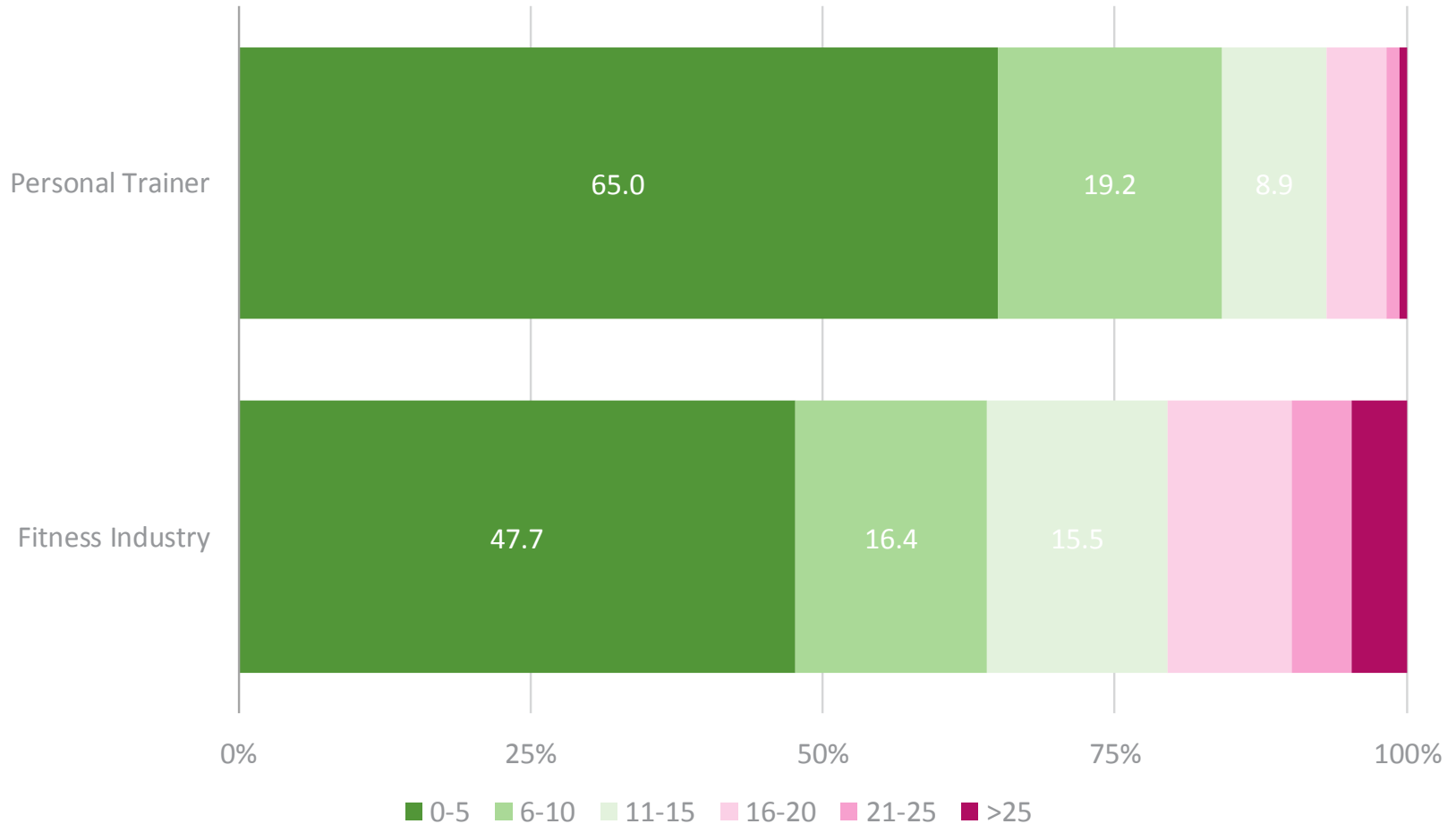
Gender distribution of Personal Trainers



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Experience Rather Limited

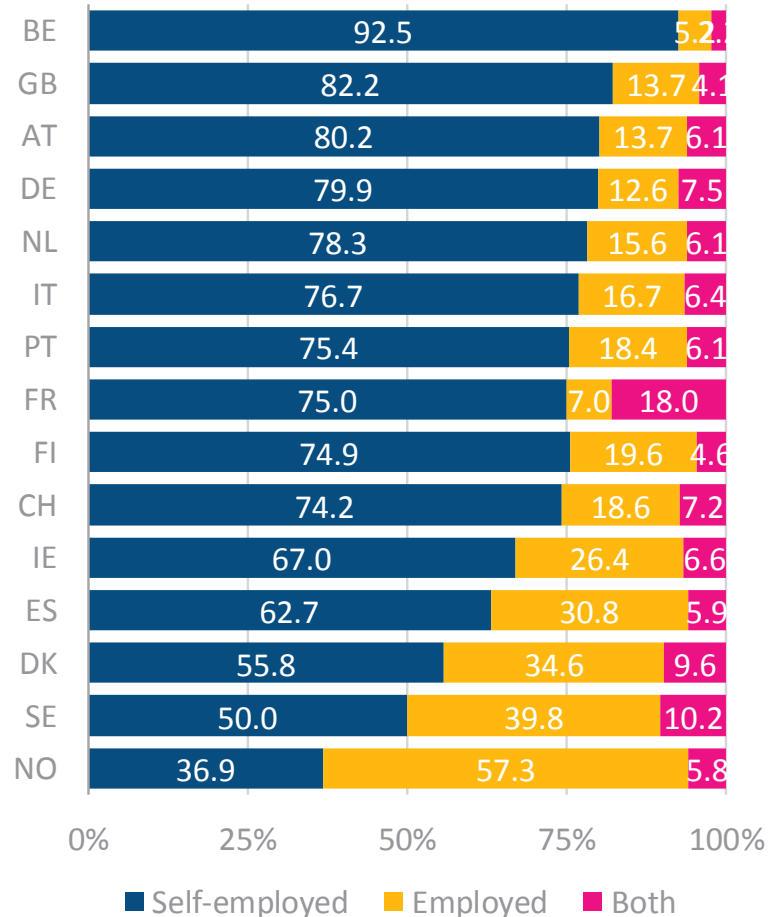
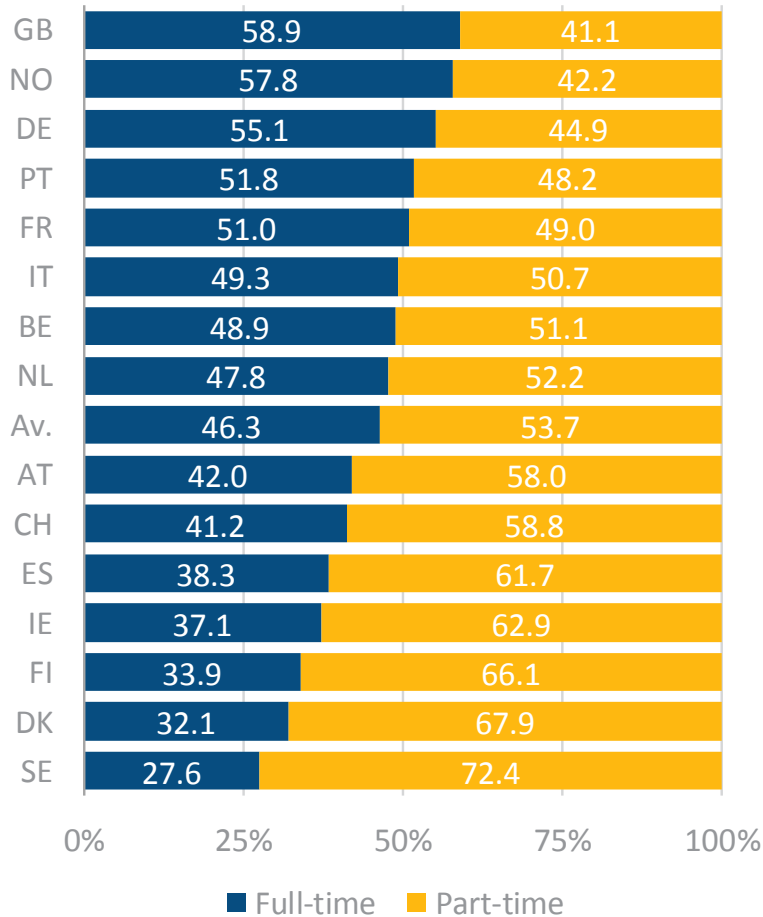
Time spent as Personal Trainer and in the industry (in years)



Personal Training in Europe

Self-Employment Prevails

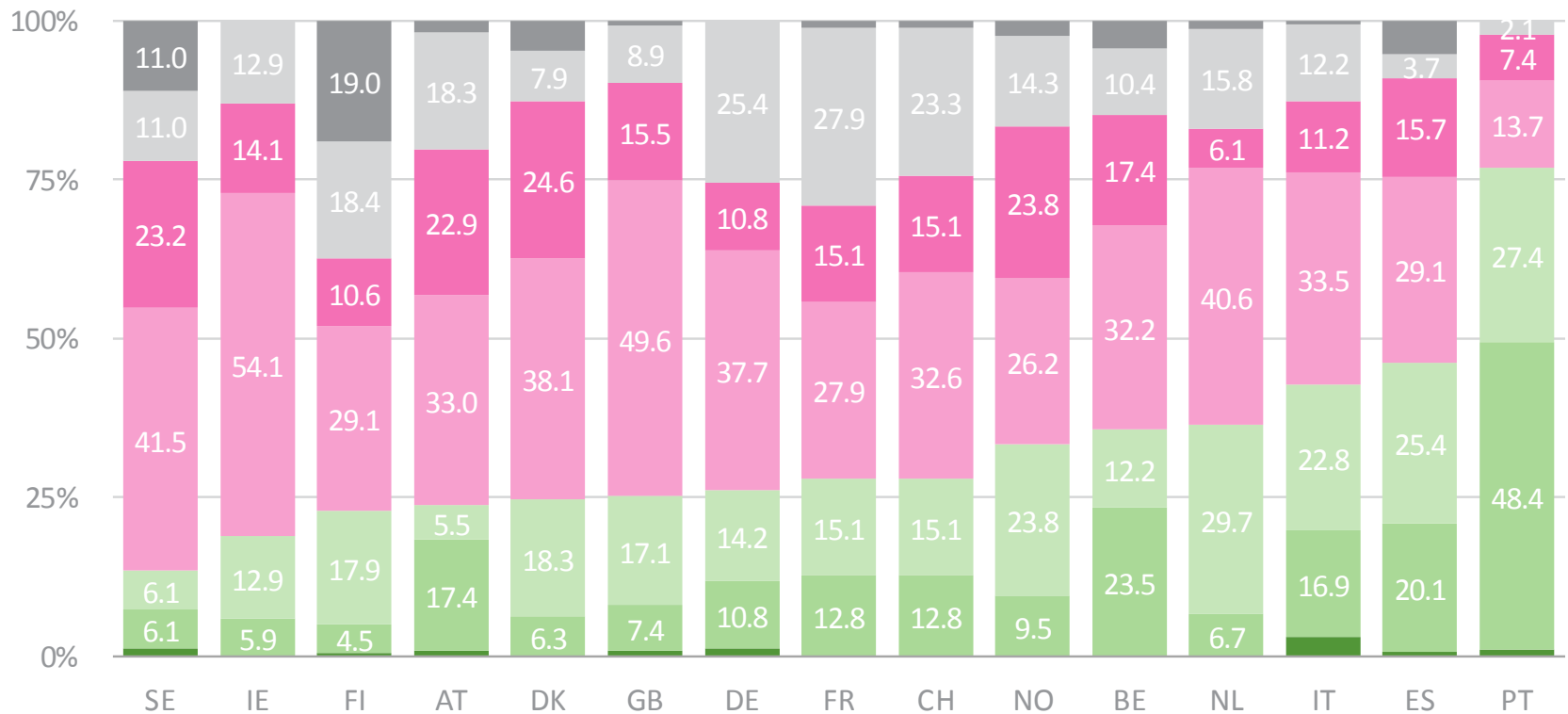
Organization of the Personal Trainer profession



Personal Training in Europe

A Heterogeneous Picture of Education

Distribution of the highest level of education

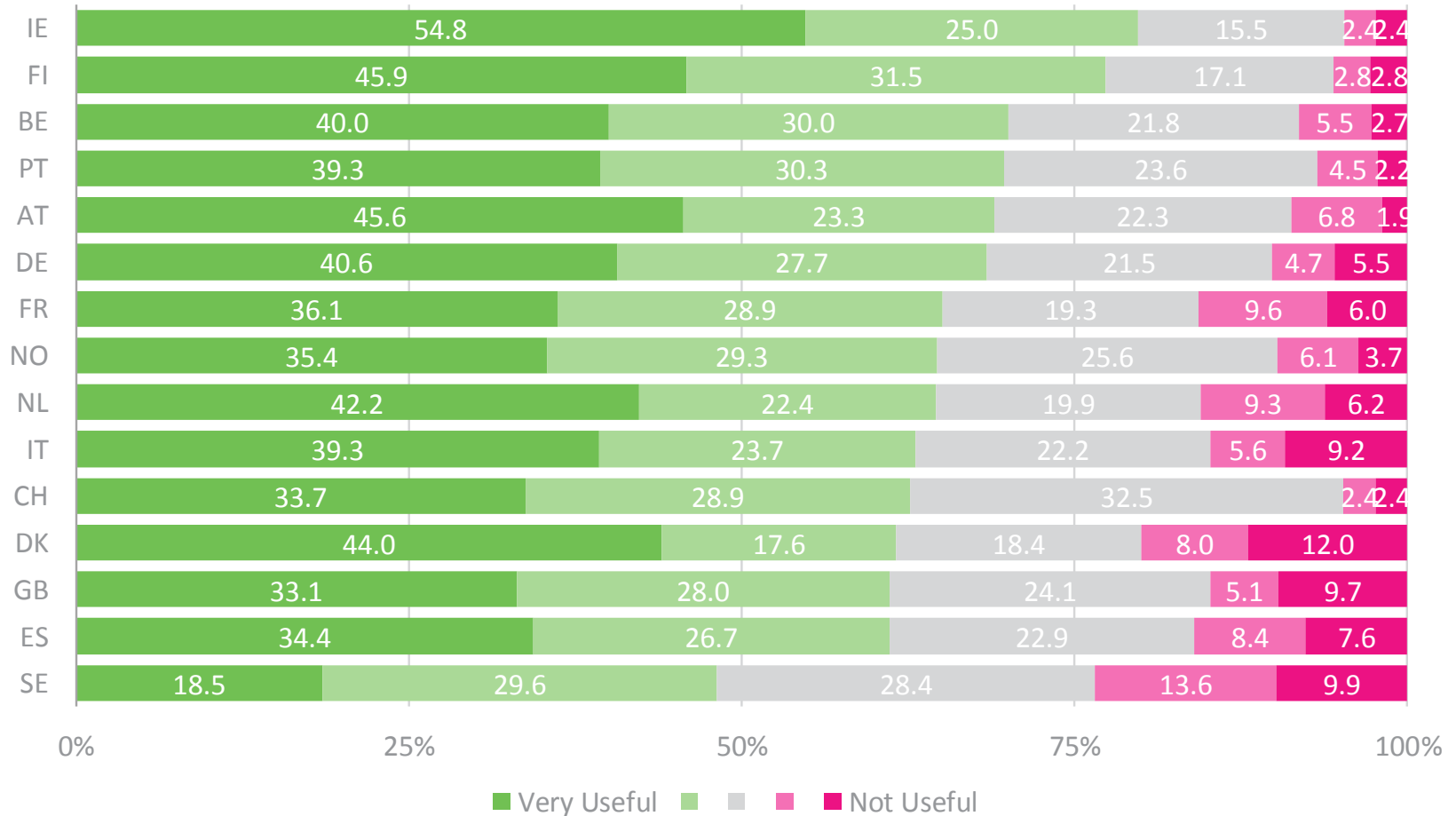


- No certified fitness-related qualification
- Basic fitness-related vocational qualification
- Fitness-related bachelor's degree
- Fitness-related Ph.D. / doctorate programme
- Other:
- Comprehensive fitness-related vocational programme
- Fitness-related graduate programme (master's degree)

Personal Training in Europe

International Standards are Useful

Usefulness of international standards



Personal Training in Europe

Order and Contact



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