

80

MILLION MEMBERS  
OF HEALTH & FITNESS  
CENTRES BY  
2025



EUROPEAN  
HEALTH & FITNESS  
FORUM

Powered by EuropeActive and FIBO

180 pts

6TH APRIL 2015  
CONGRESS CENTRE NORTH  
EXHIBITION CENTRE COLOGNE

GROWING THE FITNESS SECTOR THROUGH  
**INNOVATION**



# Growing the fitness sector through 'Innovation'

*The European Health & Fitness Forum (EHFF) is the opening event of FIBO, the largest international trade show for fitness, wellness and health. Following on the success of the two previous forums, top-notch speakers will come together to present lectures and discussions on the state of the fitness sector and the issues concerning the industry. Are we ready for the challenges ahead?*

*The third edition of EHFF invites you to ponder on the theme of innovation. Changes are needed in all areas - experts from the industry, government, healthcare and associations will explain how to do it in practice.*

*The forum will also provide for the official launch of the new industry outlook study "Growing the Fitness Sector Through Innovation." The publication will be presented to the EU Commissioner for Education, Culture, Youth and Sport, Tibor Navracsics.*

*With the impressive selection of speakers and a host of roundtable discussions and debates, EHFF 2016 is sure to generate new and valuable insights into the future of the fitness industry.*

# New industry outlook study on Innovation.

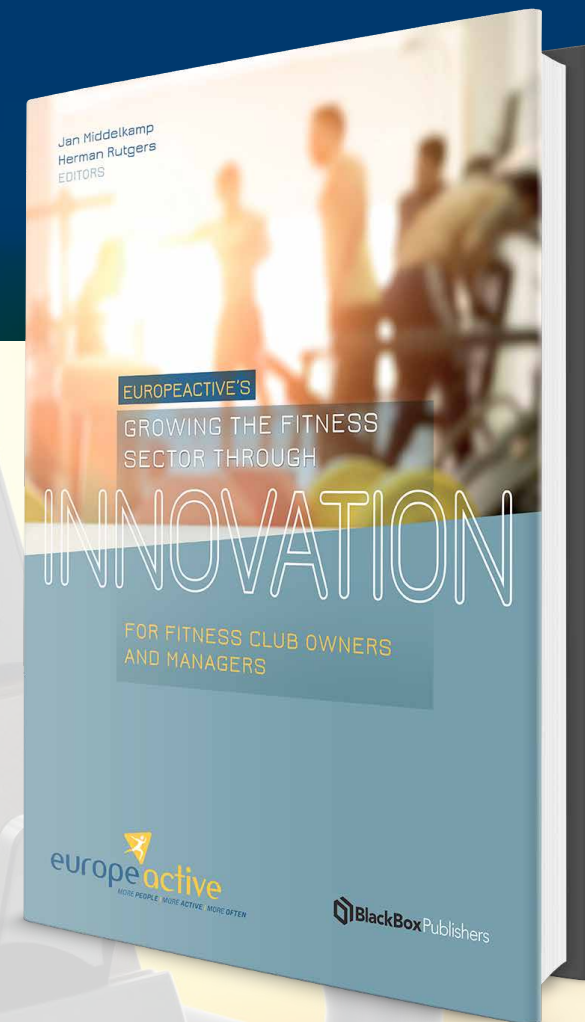
**The European health and fitness sector consists of approximately 48.000 facilities, 50 million members and 400.000 employees. For decades this sector has consistently grown in terms of members, clubs, employees, and so on. From new wearables to more effective training methodologies, through the use of big data to improved fitness standards, Europe is at the forefront of innovation. New concepts, programmes, and systems arise every year.**

**Jan Middelkamp**  
Chief editor

Within the fitness industry, the vision is promoted that fitness clubs should not only influence members in the club itself, but also support health promotion in other settings such as at home, at work and in the outdoors. Fitness clubs can be the centre of motivation and education, promoting a healthy lifestyle, and supporting health-related behaviour change.

In light of this, the 2016 European Health and Fitness Forum will see the release of a new book "Growing Fitness through Innovation." The purpose of this publication is to create an even more innovative sector as one of the drivers of the plan to get more Europeans, more active, more often. This core mission of EuropeActive applies not only to the growth of the industry, but to society as a whole.

The main target group of this book are club owners and managers in the health and fitness sector who want to build new business opportunities through innovation. The publication presents important insights, inspirational examples and practical tools and ideas that are certain to meet the changing expectations and needs of today's fast-moving society.



# Programme 6th April 2016

## 09.00 REGISTRATION AND COFFEE

## 10.00 OPENING

with Professional Standards Committee member  
Simona Pajaujiene

## 10.10 WELCOME

by FIBO and EuropeActive

## 10.15 PROGRAM OUTLINE

by moderator Herman Rutgers

## 10.20 KEY FINDINGS & CONCLUSIONS

from the new 'EuropeActive Health & Fitness Market  
Study 2016'

Karsten Hollasch, Deloitte

## 10.50 FUTURE FORECASTING & FITNESS INNOVATIONS

Prof. Carl Rohde, Professor Trendwatching &  
Innovation, University Shanghai & Amsterdam

## 11.30 EXERCISE BREAK & WATER

## 11.45 MAKING INNOVATION WORK!

Prof. Tony Davila, IESE Business School, Barcelona

## 12.30 HOW CUSTOMER DATA CAN BE USED TO DRIVE SALES

Stephen Powell, atreemo

## 12.45 ROUNDTABLE ON DIGITAL DEVELOPMENTS; THREAT OR OPPORTUNITY FOR THE FITNESS SECTOR

Intro by moderator Prof Carl Rohde, followed by  
discussion with panel members and audience.

Each Panel member will be asked to give their opinion  
on the statement and intro

### Panel members;

Rob Barker, President Precor

Cesar Carvalho, Co-founder and CEO Gympass

Peter Roberts, Founder and Chairman Pure Gym

Stefan Tilk, CEO Fitness First Germany

Mark Zabel, Global Product Manager Matrix

## 13.30 BUFFET LUNCH

# Programme 6th April 2016

## 15.00 ROUNDTABLE DISCUSSION; HOW TO CREATE AN INNOVATION EMBRACING MENTALITY IN YOUR COMPANY

Intro by moderator Prof. Tony Davila followed by discussion

Each Panel member will be asked to give an example of a successful innovation from inside or outside fitness and explain what learning we can draw from that.

### Panel members;

Enrico Bracesco, Global Comm Director Technogym  
Chris Clawson, President Life Fitness  
Edgard Corona, CEO Bio Ritmo Brasil  
Jonathan Fisher, CEO Holmes Place  
Rene Moos, CEO Healthcity/BasicFit  
Olav Thorstad, CEO SATS/Elixia

## 15.45 BREAK & EXERCISE

## 16.15 INNOVATION EXAMPLES FROM THE HEALTH & FITNESS SECTOR

Three case studies presented. What problem did the innovation solve, what barriers were overcome and what is the success to date.

## 16.30 PRESENTATION OF PUBLICATION 'GROWING THE FITNESS SECTOR THROUGH INNOVATION'

to EU Commissioner Navracsics by Nerio Alessandri, Wellness Foundation/Technogym and Sir Graham Watson, President EuropeActive

## 17.00 EU PROJECT, 'PROMOTING PHYSICAL ACTIVITY AND HEALTH IN AGEING (PAHA)'

Cliff Collins, Director of Programmes, EuropeActive

## 17.15 CLOSING STATEMENTS AND CONCLUSIONS BY FORUM MODERATOR HERMAN RUTGERS

## 17.30 BY BUS TO RHEIN TERASSEN

for networking reception and dinner

Take the opportunity for further interesting conversations and to review the day in a relaxing atmosphere whilst enjoying the view of Cologne.

# SPEAKERS BIO



## Karsten Hollasch

Karsten Hollasch is a Corporate Finance Partner in Deloitte Düsseldorf and focus on transaction services for various Corporate and Private Equity clients. In addition he heads the industry segment Consumer

Business & Transportation (including the Sports Business Group) in Germany.

His career started with three years experience in auditing and accounting at Deloitte in 1994. From 1997 – 1999 he gained industry experience in the luxury goods industry as a finance director for TAG Heuer. In 1999 he rejoined Deloitte in transaction services. Karsten has advised on numerous transactions in the health & fitness segment in the last 15 years and is responsible for various studies on this market in Germany and Europe.



## Carl Rohde

Carl Rohde is a professor of Applied Sciences in the Netherlands and China, and a world-renowned trend watcher and cultural sociologist with Science of the Time, a virtual network of market and trend researchers worldwide. His

main topic of research concerns the mentality movements within the social-cultural climate of this world: What 'moves' consumer groups, clients and citizens? What are the 'soft spots' of a generation? Of males and females in different age groups? What really makes them tick? What are their collective desires, worries, ambitions?

In 2010 and 2011, Rohde was elected Trendwatcher of the Year. In 2012, he was chosen as the Applied Science Professor of the Year in the Netherlands.



## Tony Davila

Tony Davila is the Alcatel Lucent Chair of Technology Management at IESE Business School. He has also been professor at the Harvard Business School in 2013 and 2014, teaching in the MBA core curriculum. Before coming to IESE, he was a

faculty member at the Stanford Graduate School of Business after receiving his doctorate from the Harvard Business School.

His sports management course has been running for almost ten years. He has developed teaching material with organizations such as FC Barcelona, Basketball Euroleague, Boca Juniors, San Diego Padres, Dorna, and UNESCO and WTA.

# SPEAKERS BIO



## Stephen Powell

Stephen has been marketer for over 20 years, focusing on customer data and CRM on both client and agency side which has spanned the leisure, entertainment, hospitality and gambling sectors. More recently he played a key role in the

implementation of a global loyalty programme in the gambling and entertainment sector.

In his role with data specialist Acteol, he advises on CRM strategies for organisations across Europe. He has also won a number of awards for CRM, including the Gold award from the Marketing Society for CRM excellence.



## Herman Rutgers

### Moderator

Herman is an international executive armed with over 40 years of experience in managing international businesses, 20 of which have been in the fitness industry. His career spans a wide range of multinational companies,

including: Quaker Oats, Akzo-Organon, Sheaffer Pen, Prince/Bennetton Sportsgroup and Brunswick/Life Fitness, where he was an Executive Vice President for Global Marketing, Sales and Service for seven years. In 2001 he launched his own company; Global GrOwth Partners. Through this company Herman is involved with several companies in- and outside the fitness sector as a board member, advisor or investor.

In 2007 Herman became the first Executive Director for EHFA. Since 2013 Herman has served on the Board of EuropeActive, where he is involved with events and market research. He is a much sought after speaker and moderator at industry events.

Herman is co-editor of the book "Growing Fitness through Innovation."



## Jan Middelkamp

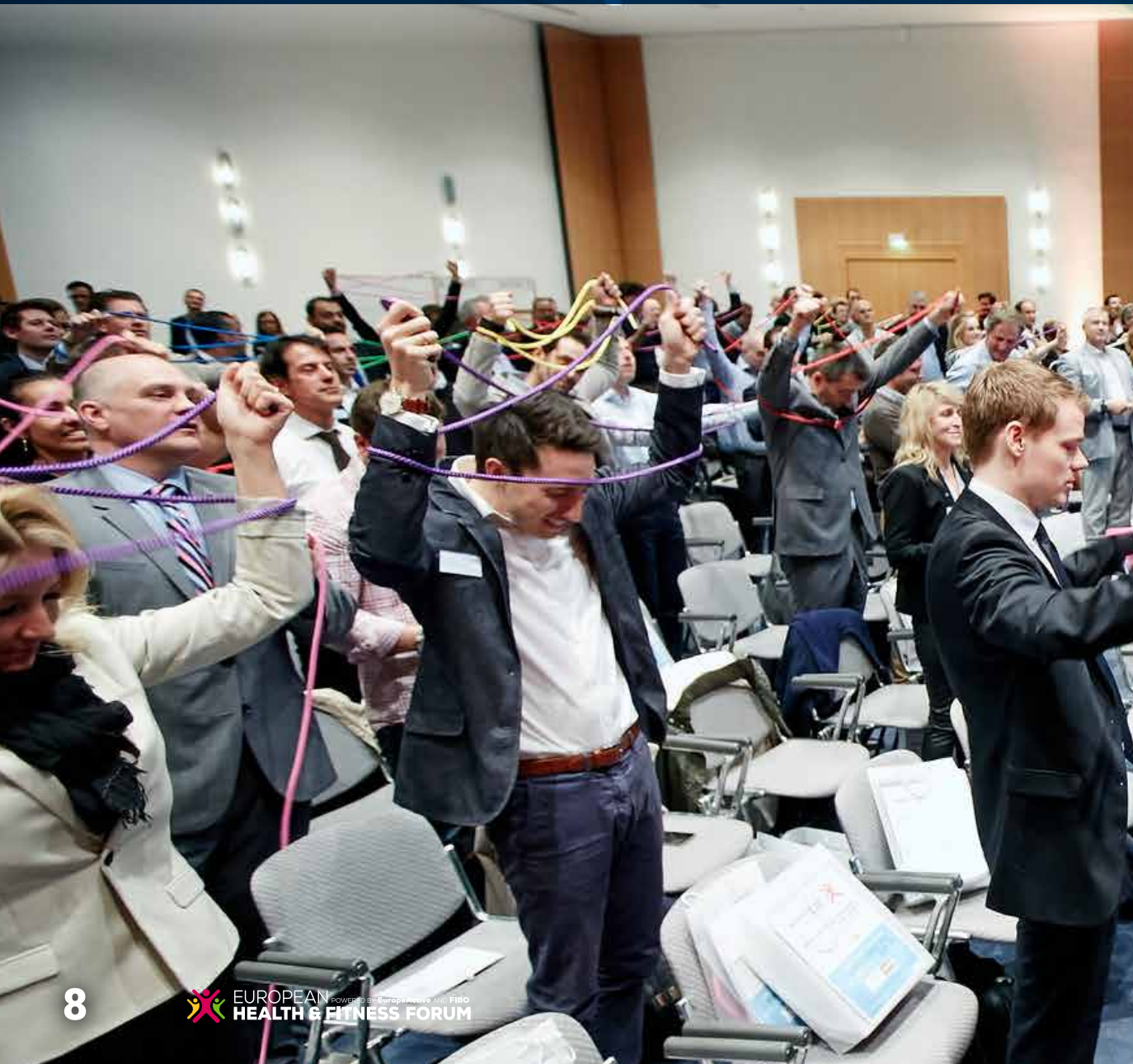
### Chief editor EHFF Book

Jan graduated from the Academy of Physical Education (Bachelor Degree) and Sports, Exercise and Health at Utrecht University (Master in Science Degree). He started as a judo teacher and was part of the Dutch

National Judo team. Later he became club and franchise manager at Fit-Care, one of the first soft franchise chains in the Netherlands. He was a consultant for the HDD Group and responsible for the introduction of Les Mills in the Netherlands and Belgium. Jan was COO of Fitness First in the Netherlands, became commercial director and shareholder at HDD Group and was COO and business development director at HealthCity & BasicFit International. From 2009 was the CEO of the HDD Group.

Currently, Jan is the CEO of BlackBox Publishers, Development Director at HDD Group and Board member of EuropeActive. He is also working on a PhD on exercise behavior of members in fitness clubs at the Behavioral Science Institute of the Radboud University, Netherlands. He published over 10 books. Jan was a member of the global innovation group of Les Mills International.

# Keynote Speakers and presentations



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## KARSTEN HOLLASCH

Partner Deloitte Dusseldorf, Germany

### Key Findings from the EuropeActive European Health & Fitness Market Study 2015

Is the fitness sector on the right path to achieve its goal of 80 million fitness studio members in Europe by 2025? Answers to that question are provided by the latest research on the state of the European health & fitness market. Which countries showed growth and who were the winners among the operators, what were the major mergers and acquisitions. What conclusions can be drawn from the developments for the future of the market.

What challenges lie ahead for 2016 and beyond?



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## PROF. CARL ROHDE

Professor (Applied Sciences) 'Trendwatching & Innovation' in the Netherlands and China (Shanghai Institute of Technology)

### Future Forecasting & Fitness Innovations

How do we analyse and project consumer trends that are important for the planning of our future business? Based on the famous "Coolhunting method", you'll find answers to how fitness industry companies can use this type of analysis in their respective business segment. The spotlight issue will be how to best deal with various consumer groups – Millennials, stressed-out 30- to 40-year-olds and the 50+ generation.

Prof. Rohde contributed a chapter to the book "Growing Fitness through Innovation."

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## STEPHEN POWELL

Atreemo

### How customer data can be used to drive sales

Data enables us to make decisions based on insights rather than instinct. It reduces the need for guesswork and increases the chance of getting it right. However data on its own (in silos) is not inherently valuable. The value comes from connecting it; this presentation will explain how that happens and give some interesting case studies.

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## PROF. TONY DAVILA

Professor of Entrepreneurship & Accounting at the IESE Business School, Barcelona, Spain

### Making innovation work!

Innovation translates creativity into valuable opportunities. As managers, a fundamental aspect is to create settings where people can be creative and then have the structures to move this creativity into value. During this session, we will cover ideas on how to translate creativity into value and how to use technology to take advantage of your company's talent to explore the environment for opportunities.

Prof. Davila contributed a chapter to the book "Growing Fitness through Innovation."

# About EuropeActive

Since 1996, EuropeActive has acted as the unifying voice for the European health and fitness sector, representing its interests at key EU institutions in Brussels and beyond.



EuropeActive's mission is not only to turn back the tide of physical inactivity but to ensure that more and more people get active as a result of an effective synergy between all the actors in the sector. As a not-for-profit body comprised of members and partners from across the continent, EuropeActive supports its stakeholders by offering a range of key industry events, including the European Health and Fitness Forum, FIBO Innovation Tours, International Standards Meeting, National Associations Forum and the Executive Leadership Forum.

The organisation is also the standards setting body of the health and fitness sector and runs a quality assurance process EREPS that registers instructors, trainers and teachers, and ensures the high quality of service, customer's exercise experience and results. In 2015, as part of its mission, EuropeActive launched two highly successful projects called ALCIS and PAHA, encouraging thousands of people, young and old, to reflect on their lifestyle choices in relation to physical activity.

EuropeActive is engaged in market and scientific research to improve the quality of knowledge and evidence about the fitness sector. This is facilitated through the EuropeActive "knowledge center", the most reliable source for health, fitness and physical activity related information.

The organisation currently represents more than 15,000 facilities, 20 National Associations, industry-leading providers, educational institutions and private individuals.

For more information visit our website at; [www.europeactive.eu](http://www.europeactive.eu)

# About the PAHA Project

Europe faces a demographic challenge. Each year the life expectancy across the continent increases by three months, and over the next 50 years, the number of people 65 and over will double, putting an enormous pressure on our healthcare and social security systems.

Physical activity can help Europe's older generations remain independent and maintain a good quality of life for as long as possible, reducing the risk of noncommunicable diseases, such as hypertension and diabetes, while fostering social interaction and community participation, and improving levels of social cohesion.

This is where PAHA comes in. Part-funded by the European Commission, the EuropeActive's flagship project is a tailored intervention for older adults with different functional capacities. Through a supervised and structured exercise programme for senior citizens (55-65 years olds) and the involvement of fitness coaches, instructors and community workers, PAHA intends to transform currently inactive people into regular exercisers at a level that is beneficial to their health.

By measuring their physical activity levels using the MyWellness Key tracker, PAHA aims to develop a methodology that can be easily adapted and replicated in different settings, allowing more citizens to take up regular exercise and health-enhancing activities. The project is currently running in eight countries – Denmark, Finland, Germany, Greece, Hungary, Ireland, Portugal and the United Kingdom – and its first phase will come to a completion in the first half of 2016.



# EuropeActive and FIBO thank you for attending the 3<sup>rd</sup> European Health & Fitness Forum

We look forward to welcoming you again in  
Cologne at the 4<sup>th</sup> European Health & Fitness  
Forum to be held on **WEDNESDAY 5<sup>th</sup> APRIL, 2017**

The 2017 FIBO tradeshow starts on  
**Thursday 6<sup>th</sup> April, 2017**



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business.

