SPAIN: Evolution and Characteristics of the Private Sport Sector – Focus on Fitness Centres and Gyms

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Selected country facts (in 2013)	
Capital	Madrid
Geographical size (km²)	505,944
Population (million)	46.73
GDP (euro per capita)	22,000
GDP (per capita in PPS)	90
Annual net earnings average (€)	20,062

The Organisational Framework of Sport in Spain

The Spanish sport system is an outcome of the collaboration between the public, voluntary and private sectors. Public institutions make up a coherent network of organizations, and play a predominant role in the sport system. This phenomenon can be explained by the social-historical nature of Spain, which was late in becoming developed as a democratic society and over-relying on the public sector (Burriel & Puig, 1999; Puig, Sarasa, Junyent, & Oró, 2003). The voluntary sector is associative by nature, and it includes the Spanish Olympic Committee, sport federations, sport clubs, the groupings of clubs and sport federations, sport promotional entities, and professional leagues. The private sector encompasses sport service companies,

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professional sport clubs, fitness and wellness centres, and gyms. The composition of these three sectors is presented in detail in Fig. 1.

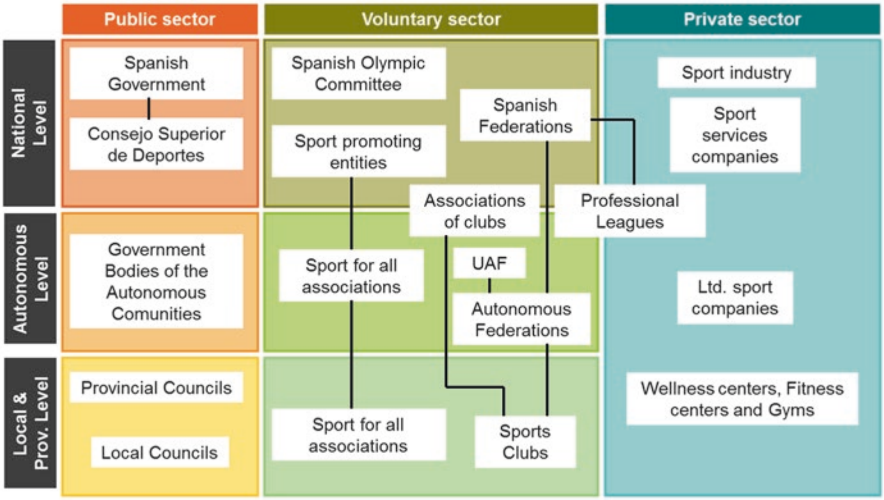

Fig. 1 The Spanish sport system. Source: Adapted from Puig et al. (2003).

The Public Sector

The public sector has a decentralized political structure and it operates at three levels: national, regional and local. There is no ministry of sport in Spain. Instead, the highest responsible organism for the sport sector is the National Sports Agency CSD (Consejo Superior de Deportes). The CSD disperses the government's sport-related mandates to the various sport federations and sport organizations throughout the Spanish territory. It is also responsible for authorising and revoking the Spanish sport federations' licensing. In addition, the CSD, in conjunction with the federations, develops the federations' goals, programmes, budgets and structures. It also grants economic subsidies to the federations, as well as to other sport organizations and associations.

The CSD interacts in collaboration with other autonomous communities, which are self-governed Spanish regions. It also represents Spain in sport-related issues at the European Union level. Due to the fact that sport is included in the Treaty of Lisbon, the Spanish Secretary of State for Sport attends the EU Council of Sport Ministers when it meets formally (Puig, Martínez, & García, 2010).

Despite the differences that exist between the autonomous communities, they have the following common responsibilities at a regional level: the promotion, construction and management of sport facilities; the overseeing and coordinating of the sport federations on a regional scope; the coordinating, promoting and overseeing of the sport associations; the legislative authority overseeing sport policies at a regional level; the granting of sport subsidies; physical education, and other school-related sport activities. Similar responsibilities are also undertaken in relation to the so-called 'diputaciones provinciales' (provincial or district councils), but they mainly focus on supporting local councils. (Puig et al., 2010.)

Municipal governments play an essential role within the sport sector at the local level. Municipalities not only have an implementing role, but they actively intervene with the sport policy as well. The local entities have the authority to construct and manage local sport facilities, as well as develop sport programs at all age levels, and assist the sport clubs that are located in their area. The municipal governments' sport councils offer sport facilities to clubs and individuals, and they organise local competitions and manage municipal sport training centres. (Lera-López & Lizalde-Gil, 2013.)

The Voluntary Sector

The voluntary sector is also present at the national, regional and local levels. Sport clubs at the local level constitute the framework of the voluntary sector. Each club may be assigned to one or several governing bodies for sport at the regional level (regional federations), which in turn are linked with the governing bodies at the national level. Since 2015, the Spanish Federal Sport Association (Asociación del Deporte Federado Español) has been acting as an umbrella organisation at the national level, coordinating some of the governing bodies (CSD, 2015).

The Spanish Olympic Committee is a non-profit legal entity, and serves the public interest at large. Some of its objectives include developing the Olympic movement, and the diffusion of the Olympic ideals. It integrates 30 federations corresponding to the various Olympic categories, and represents Spain in the International Olympic Committee. The Spanish Paralympic Committee was founded in 1995 (Ramos & Martínez de Haro, 2009).

Sport Federations are private legal entities that function at the national level. Sport federations include sport clubs, regional federations, professional leagues, and other entities that are interested in the promotion and development of a specific sport on a national scope. Contrary to what happens in other European countries, there is not one unique coordinating entity that collects the petitions from the different regional federations, therefore, each regional federation must handle the negotiations with the proper public authorities. The exception is in Catalonia, where the Sports Federation Union of Catalonia (UFEC – Unió de Federacions Esportives Catalanes) handles this task (Iglesias & Tarragó, 2012).

Professional leagues are entities included in the sport federations, as mentioned in the previous paragraph. Professional leagues are private legal entities that are autonomous organizations, operating out of their corresponding federation. They are made up of those clubs that participate in the official professional competitions at the national level. The main professional leagues are The National Professional Football League (LPF), The Association of Basketball Clubs (ACB), and The Association of Handball Clubs (ASOBAL).

In accordance with the 1990 "Law of Sport" (Ley del Deporte, 1990), *sport clubs* are private legal associations consisting of self-employed owners and companies, whose objective is to promote one or more types of sport; to promote sport among their members; and to participate in sport activities and competitions. Sport clubs are classified into "elementary" clubs, "basic" clubs, and Sports Corporations (SAD – Sociedades Anónimas Deportivas). Elementary clubs have a simple legal structure, and they are dedicated to practising sport and participating in competitions at the local or regional levels. Basic clubs have more complex legal structures, as they are incorporated entities. Both may participate in sport competitions if they sign up with their corresponding federation. On the other hand, those clubs that participate in the official sport activities professionally, or at a national level, must form a Sports Corporation, as described in Article 15 of the Spanish Sports Act. (Ley del Deporte, 1990.)

It behoves to mention the existence of *sport clubs' associations* and *sport promotion entities* – both described in the Spanish Sports Act – which are both under national regulations and operate outside the regions. The sport clubs' associations have the exclusive objective to develop sport proceedings in those events and activities which are not contemplated by the sport federations; the sport promotion entities function as promoters and organisers of sport and physical activities that are leisure, educational or social in nature. (Ley del Deporte, 1990.)

The Private Sector

The Spanish private sport sector is made up of the sport industry, sport services companies, professional sport clubs, and fitness and wellness centres and gyms. While the sport industry operates at a national level, the gyms and wellness centres are based locally, although they frequently form chains that operate at the national level. In 2015, there were 31,139 organisations in the Spanish private sector whose main economic activity was sport-related (DIRCE, 2015). This figure represents 0.98% of the total companies registered in the country (DIRCE, 2015).

After describing the structure and organizational framework of the Spanish sport sector, the next section offers an analysis of the evolution and principal characteristics of the private sport sector in Spain during the last years and it includes information pertaining to the number of existing organisations, legal structures, number of employees, and territorial layouts. As a complement to this analysis, the third section focuses on studying the emerging and developmental processes of a specific type of private sport organisation in Spain: the fitness centres and gyms. An in-depth analysis of this kind of organisations has been undertaken as they have become especially successful in Spain in the last decades. A second reason to choose this kind of organisations has been the availability of data. The chapter concludes with a section that discusses the results, integrating the various empirical findings.

Muscle and Fitness Room in the Centre Esportiu Municipal Horta (Municipal Sports Centre, CEM Horta) in Barcelona. This centre is an example of the collaboration between private and public sport sectors in Spain. It is managed under the government concession by the company Horta Esportiva. In addition to the Muscle and Fitness Room, the facilities of CEM Horta include a football turf pitch, used by more than 250 players who form all the teams of Unió Atlètica d'Horta, and 33 × 25 m swimming pool, used by the swimming and water polo teams of Unió Esportiva d'Horta. The swimming pool is also used by all neighbourhood schools as the students attend swimming courses. *Photo: Horta Esportiva*.

The Private Sport Sector Development

Most (77.1%) of the 31,139 sport organizations in Spain in 2015 carried out activities as classified in the Section 931 of the "National Classification of Economic Activities Code" (CNAE-2009)[1]. The number of organizations associated with sport activities in Section 931[2] has continually risen during the last years, increasing from 16,291 entities in 2010, to 24,003 in 2015, which is equivalent to a growth of 47.3%. Of the remaining organizations, 6932 (22.3%) were specialty sport retailers (Section 4764) and 204 (0.7%) sport articles manufacturers (Section 323), as illustrated in Table 1[3].

[1] CNAE-2009 is the Spanish equivalent of the *Statistical classification of economic activities in the European Community* (NACE Rev. 2, 2008). Section 931 of CNAE 2009 does not include the development of marinas, nor ski resorts (included in Section 9329).

[2] Section 931 of the CNAE 2009 includes the activities referred to the management of sports facilities (931.1), sport clubs' activities (931.2), private sport centres or gyms (931.3), and other sport activities (931.9).

[3] It has not been possible to include other sport activities, as the statistical sources available do not provide further breakdowns.

Table 1 Evolution of the number of organisations linked to sport in Spain in 2010–2015.

Type (CNAE-2009 section)	2010	2011	2012	2013	2014	2015
Sport Activities (931)	16,291	16,827	18,167	19,270	21,506	24,003
Sport articles manufacturing (323)	188	175	175	174	177	204
Retail commerce of sport articles (4764)	7743	7653	7669	7253	7052	6932
Total	**24,222**	**24,655**	**26,011**	**26,697**	**28,735**	**31,139**

Source: Research findings based on data obtained from DIRCE (2015).

As to their legal stature, 26% of the sport organisations correspond to self-employed owners (see Table 2), while the remaining 74% correspond to companies. Within the latter, the number of corporations has slightly declined in the last few years, from 500 existing in 2010, to 498 in 2015, representing 2.1% of the total. Limited Liability Corporations are the most common type of sport companies, which in 2015 accounted for 36% of the total, after having experienced a steady growth since 2010. Other legal structures, such as associations and institutions connected to sport, as well as different types of legal Spanish companies – civil associations, cooperatives, partnerships or joint ownerships – have steadily increased during the last few years, comprising 35.9% of the overall total.

Table 2 Evolution of the number of organizations of sport activities in Spain according to the number of workers employed in 2010–2015 (Section 931).

Type of organization	2010	2011	2012	2013	2014	2015	% 2015
Individuals	4117	4250	4636	4639	5399	6243	26.0
Companies	12,174	12,577	13,531	14,631	16,107	17,760	74.0
Corporations	*500*	*504*	*503*	*500*	*488*	*498*	*2.1*
Limited Liability Co. (LLC)	*5858*	*6041*	*6679*	*7320*	*7966*	*8642*	*36.0*
Other legal entities	*5816*	*6032*	*6349*	*6811*	*7653*	*8620*	*35.9*
Total	**16,291**	**16,827**	**18,167**	**19,270**	**21,506**	**24,003**	**100**

Source: Research findings based on data obtained from DIRCE (2015).

Taking all this data into consideration, it is not surprising that a study about sport economics unveiled that it is very difficult to obtain reliable information from smaller sport companies and self-employed sport businesses (Arruza et al., 2011). Self-employed individuals make up a fourth of the total of these businesses. Most could be included within the special regime of self-employed workers that carry out their activities in one of the three groups in the Tax on Commercial and Professional Activities that are connected to sport. One may assume that sport trainers, coaches and sport professionals, as well as referees, retail workers, administrative personnel or sport betting business managers, are all included in the Tax on Commercial and Professional Activities (Martínez-Lemos & Romo-Pérez, 2015). Individual business people who are in charge of the gyms and adventure sport companies would have to be included in this special regime as well. The first economic studies on outdoor sport activities that were conducted in Catalonia (Olivera & Olivera, 1999) dealt with adventure sport companies. The researchers pinpointed the existence of a high percentage of sole proprietorships.

Regarding the number of workers within these sport organisations in Spain, 41.6% of the 24,003 of said organisations lack employees (see Table 3). This is a high percentage, but less than the average of the overall Spanish corporate industry; organisations without workers in 2015 made up 55% of the total amount.

Table 3 also shows that 41.8% of the organisations are small businesses with less than six workers, out of which 15.4% have between six and 49 workers, and the remaining 1.2% of the organisations employ 50 to 399 workers. On the other hand, between 2010 and 2015, sport organisations without any employees grew by 47.3% – the same growth as all the organisations combined – and the sport organisations with one or two workers had a slightly higher growth (47.9%) than those without employees. The growth in this same period was even greater among those companies that had three to five workers or six to nine workers, with increases of 59.2% and 83.3% respectively. Taking this data into consideration, one cannot conclude that only those sport organizations without workers have experienced growth in Spain during the recent economic downturn (Rocha & Aragón, 2012).

Table 3 Evolution of the number of sport activity organisations in Spain by number of employees in 2010–2015 (Section 931).

Number of employees	2010	2011	2012	2013	2014	2015	% 2015	% Δ 2015/2010
0	6786	7320	7857	7775	8828	9994	41.6	47.3
1–2	4737	4571	5041	5888	6484	7008	29.2	47.9
3–5	1901	1926	2060	2255	2592	3027	12.6	59.2
6–9	885	947	1044	1168	1452	1622	6.8	83.3
10–19	1132	1145	1210	1252	1356	1514	6.3	33.7
20–49	569	612	655	630	515	547	2.3	−3.9
50–99	146	170	179	164	141	153	0.6	4.8
100–199	108	104	90	87	86	89	0.4	−17.6
200–499	23	27	26	46	46	40	0.2	73.9
500–999	2	3	4	4	5	8	0.0	300.0
1000–4999	2	2	1	1	1	1	0.0	−50.0
5000 or more	–	–	–	–	–	–	–	–
Total	**16,291**	**16,827**	**18,167**	**19,270**	**21,506**	**24,003**	**100**	**47.3**

Source: Research findings based on data obtained from DIRCE (2015).

Among the larger sport organisations, those with 200–499 workers grew by 73.9%, from 23 to 40 entities, and those with 500–999 workers increased from two to eight entities. On the other hand, by 2015, the number of sport organisations with 1000–4999 employees shrank from two entities in 2010, to just one (see Table 3).

Regarding the sport organisations' territorial distribution, more than half (58.2%) is concentrated in four regions: 17% in Catalonia; 16.3% in Madrid; 14.7% in Andalusia, and 10.2% in Valencia. On the other hand, a study generated from the DIRCE using data from the year 2012 (Martínez-Lemos & Romo-Pérez, 2015), suggests the existence of a highly relative statistical correlation between the number of micro and small organisations within Section 931 (sport activities), the level of the Gross Domestic Product, and the autonomous communities' populations.

Structure and Characteristics of Fitness Centres and Gyms

During the last three decades in Spain, a new type of private initiative has evolved, consisting of fitness centres and gyms. This has instigated changes of how sport is perceived by a significant part of the population, leading to a large social demand for sport activities. This chapter is focused on the analysis of the evolution and current features of these centres, which constitute an essential part of the private sport sector in Spain.

At the end of the 1990's, fitness centres and gyms were attractive business activities from the economic standpoint. The fitness centre business was a developing market, generating a large return of investment, along with a clear growth trajectory. This was evidenced by the arrival of large multinational fitness centre companies at the Spanish market in the beginning of the first decade of the twenty-first century. Companies like Holmes Place, Esporta, Fitness First, and LA Fitness all had ambitious expansion plans, which covered the entire national territory, surpassing family gyms and small gym chains of the previous years, which were mainly dedicated to bodybuilding workouts.

Subsequently, a change in trends took place, leading to larger centres which were equipped with more advanced technology. Therefore, the activity and usage of the traditional free weight rooms – the previously focal activity – was pushed into the background. As a result of this new and upcoming trend, new centres emerged, offering a wider range of group classes and other services, such as cafeterias, hair salons, physical therapy, nutritional consultation, and day care facilities (Cámara, 2015). In addition, social gatherings, thematic activities and parties were offered, striving to obtain the users' further involvement in the centres (Dorado, 2006).

This business trend changed at the end of 2007 when the recession started, and it continues to have a lasting effect as of this writing. Subsequently, all sport business development plans were consequently altered. As a result, a new type of centre referred to as "low-cost gyms" started to emerge in Spain in 2009, shortly after the start of the recession, which had a major influence in the industry. During the same period, a new sport centre known as 'studios' or 'fitness boutiques' emerged into the private sport sector, having a huge influence on the sector's evolution. These *fitness boutiques* are specialised centres dedicated to a single physical sport activity, functional training, or as of 2013, a more personalised training through the utilisation of *whole body electromyostimulation*. (Cámara, 2015.)

Market research conducted by DBK[4] illustrates that, between 2000 and 2007, the fitness and gymnastic companies were growing at a constant rate of around 3%, comprising 4630 centres in 2007 (see Table 4). This growth was due to the expansion of the major chain operators, opening large fitness centres with a vast range of activities, and providing complementary and supplementary products and services. Additionally, as previously mentioned, there was a shrinkage in the number of smaller gyms – those that followed the traditional business model dedicated solely to martial arts or bodybuilding, or that failed to offer complementary services (Sánchez Martín, 2014).

In 2008 there were 4700 centres – 1.5% more than in the previous year – indicating the start of a slowdown in the growth rate, but still showing sustained growth in the expansion of large chains (see Table 4). The year 2009 was a turning point in the fitness centres' growth in Spain, since both the multinational fitness centres and the low-cost centre operators (which were introduced in Spain in 2009), started to halt their expansion plans as a consequence of the uncertainty created by the economic recession. Consequently, although fitness centres maintained a moderate growth rate, they were unable to counteract the large decline that caused the closing of the numerous centres affected by the recession. The effects of the economic downturn continued to ripple throughout the sector; in 2015 there were only 3900 fitness centres and gyms, 17% fewer than in 2008.

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[4] This refers to the various editions of the *economic sector* studies conducted by the consulting company DBK about the private sport centres, classified as *gyms* (information available at: www.dbk.es). This classification excludes all public sport facilities, including those that have been licensed out by the government. The information used in this paper comes from this source, unless otherwise specified. The economic data related to this sector varies considerably from one source to another. This is due, in part, to the fact that there is not a clear understanding of what the scope of this sector is or what it entails. As an example, the numbers provided by KPMG for the year 2007 state that this sector had 6,000 sport centres and total annual revenue around 1.7 billion euros (information available at www.kpmg.es). Meanwhile, the National Federation of Sport Facilities Owners calculated that the number of these companies surpassed 8,000 entities in 2006. However, their definition included "those (companies) that are in the business of leisure sport, physical exercise, physical sport activity, and lifeguards" (information available at www.fneid.es). The National Institute of Statistics estimated that this sector of Section 926 (sports activities) of the 1993 National Classification of Economic Activities Codes was composed of 13,778 companies with revenues amounting to 5.729 billion euros in 2007 (information available at www.ine.es).

Table 4 Evolution of the fitness centres and gyms sector in Spain in 2005–2015.

	2005	2006	2007	2008	2009	2010	2011	2012	2013	2014	2015
Number of centres (n)	4370	4500	4630	4700	4600	4450	4300	4100	3950	3900	3900
Variation in no. of centres (%)	3.0	3.0	2.9	1.5	−2.1	−3.3	−3.4	−4.7	−3.7	−1.3	0.0
Market (MEUR)	920	1000	1050	1065	980	920	865	800	785	800	825
Market variation (%)	8.8	8.7	5.0	1.4	−8.0	−6.1	−6.0	−.5	−1.9	1.9	3.1

Source: Research findings based on data obtained from DBK (2015).

Regarding the economic data, the DBK research points out that the total revenues for the fitness centres and gyms grew at an annual rate of around 8% between the years 2000 and 2007 (Table 4). As an example, total revenues for this industry increased by 8.8% in 2005, and by 8.7% in 2006, reaching one billion euros that year. In 2007 industry revenues increased by 5% over the previous year – nearly 4% points less than the growth rate in 2006 – and in 2008 there was a mere 1.4% increase. Furthermore, in 2009 the effects of the recession led to a reduction in home expenditures, with widespread negative consequences: private sport centres' revenues suffered a severe contraction. Revenues fell by 8% in 2009, declining to 980 million euros. This drastic decrease in revenues continued incessantly until the year 2013, although somewhat more moderate during 2010, when the industry's revenues fell by 6.1% – to 920 million euros – which was the same amount of revenues as in 2005 (see Table 4).

The economic situation continued to worsen in 2011 and 2012. Revenues dropped by 6% in 2011, falling to 865 million euros. Meanwhile in 2012, the contraction was even greater, declining by 7.5% to 800 million euros. The largest contraction in 2012's revenues can be partly explained by the negative effects that the increase in the Value Added Tax had on demand as a whole. The increase in the VAT went into effect on 1 September 2012 after the mandate of the governmental decree. This increase raised the VAT by 13 points, from 8 to 21%. Numerous centres were forced to make the decision to bear this burden either partially or in its entirety, at the cost of a reduction in their operating margins, in order to prevent a possible loss of users. Revenues hit bottom in 2013. However, the percentage decrease was moderate, at 1.9%. In 2014 this tendency reversed, starting a recovery in the sector, experiencing a 1.9% increase in revenues during 2014.

Regarding the revenue composition, revenues from sport activities (members' dues) in 2008 represented 88% of the total revenues from fitness centres and gyms. The remaining percentage corresponded to the revenues related to other activities and optional services offered by the centres. This included personal trainers, beauty services, sales of clothing or sport items, and items from the cafeteria and vending, for example. In 2012, 90% of the total revenues came from sport activities, while only 10% corresponded to optional services. Therefore, proceeds from optional and complementary services declined, resulting in an increase in the percentage of revenues generated from sport activities. This is a clear illustration of how the fitness centre and gym patrons chose to cut back in complementary services during the two worse years of the Spanish recession.

After analysing the decrease of the revenues and their composition in depth, one might deduce that the impact of the recession caused customers to move away from fitness centres and gyms into less expensive forms of physical and sport activities, such as working out in one's own home or in public outdoor spaces. This trend coincided with behavioural and dynamic social patterns, as a result from changes in the corporal culture, individualism and post-materialism (Llopis-Goig, 2014).

Nevertheless, the number of private gym members and users has not stopped increasing in the last decades, as illustrated in Table 5. This is contrary to what some economic experts had forecasted, who foresaw a shift from the private sector to the public-owned centres. This data also illustrates the appeal of the *low-cost* centres, which in many cases offer an even more economical alternative than the municipal sport centres (Sánchez Martín, 2014).

Table 5 Evolution of the membership and use of gymnastics facilities in Spain in 1990–2015 (%).

Spanish population older than 15 years old who …	1990	2000	2005	2010	2015
Is a private gym member	0	3	8	10	18
Realises his/her physical or sport activities in a private gym	7	8	8	13	23

Base: population older than 15 years old. Sources: Research findings from García-Ferrando and Llopis-Goig (2011; 2017).

As a result, the low-cost centres (which include the fitness centres that have introduced low-cost pricing in their membership rates) have been responsible for taking in the 'wanderers' who were price sensitive, but preferred to utilise sport facilities for their routine workouts. Low-cost centres, such as the multinational operators Basic-Fit, VivaGym, and McFit, or national chains such as Dream Fit, Altafit, and Fitness 19, have positioned their dues around 20 euros per month[5].

Upon review of the economic data and analysing the variation of the average revenues per private sport centre (see Table 6), a 14.9% decline occurred between 2008 and 2012. Average revenues per private sport centre went from a high of 227,000 euros per centre in the years 2007 and 2008, down to 195,000 euros per

[5] According to the 'Annual Study of the Spanish Fitness Market' (Life Fitness, 2015), in 32 per cent of these centres, monthly dues were between 30 and 40 euros, while in 27 per cent of the centres, they were between 20 and 30 euros. As a group, six of every ten centres had monthly dues between 20 and 40 euros. As an example, the price of the monthly dues at Basic-Fit and VivaGym in May, 2016 was between 15.95 and 24.90 euros in both cases, with the VAT included, both having the same access and usage conditions (unlimited entry).

centre in the year 2012. This notable decline in business revenues cannot be singularly caused by a minor reduction in revenues from optional and complementary services, but must necessarily encompass a reduction in revenues generated from sport activities (membership dues). In other words, private sport centre users reduced their expenditures in said facilities, looking for more economical options, such as low-cost centres.

Table 6 Evolution of the average revenues in fitness centres and gyms in Spain in 2005–2015.

Revenues	2005	2006	2007	2008	2009	2010	2011	2012	2013	2014	2015
MEUR	0.211	0.222	0.227	0.227	0.213	0.207	0.201	0.195	0.199	0.205	0.212
Variation (%)	–	5.2	2.3	0.0	−6.2	−2.8	−2.9	−3.0	2.1	3.0	3.4

Source: Research findings based on data obtained from DBK (2015).

The revenues per centre during 2013 (Table 6) rebounded 2.1%; they continued rising in 2014, with a 3% increase; the increase in 2015 was 3.4%. These increases result from the change in the fitness centres' and gyms' revenue sources; revenues rebounded from the optional activities and services provided.

We may therefore conclude that the decline in the total revenue volume in the fitness centres and gyms was not so much due to the reduction in their total number of users, but to the decrease in the membership dues average, caused by a downward price pressure created by the *low-cost* centres.

That data presented within may be expanded by an *ad hoc* study published recently, containing a sampling of 1662 people who work in fitness centres in Spain (Boned, Felipe, Barranco, Grimaldi-Puyana, & Crovetto, 2015). According to the authors, the workers in Spain's fitness centre and gym industry are comprised almost equally of men and women (50.7% and 49.3% respectively), with an average age of approximately 32 years old. Regarding their education, 50.2% have a university education, and 27.9% have professional training. Finally, the authors conclude that these workers possessed a vast amount of professional experience and an adequate level of training for tasks they undertake in their respective work centres.

The fitness centres and gyms in the study have a total combined surface area of over three million square metres. Half of the establishments are small in size, occupying less than 500 square metres. However, the large size of centres built recently in the suburbs of large cities increased the average size to over 750 square metres per establishment.

This sector is characterised by a surprisingly large number of small companies. There are numerous companies dedicated to the management of just one centre, and along with them, a few holding companies that manage various centres. Nevertheless, this industry is consolidating, with the top ten companies going from a 27.7%

Table 7 **Consolidation in the fitness centres and gyms industry in Spain in 2009–2014.**

Business consolidation	2009	2012	2014
Top 5 companies in the sector (%)	19.3	21.7	24.9
Top 10 companies in the sector (%)	27.7	33.5	39.3

Source: Research findings based on data obtained from DBK (2015).

market share in 2009, to a third of the market in 2012, reaching a 39.3% market share in 2014 (see Table 7)[6].

Finally, Table 8 shows the main characteristics of the top ten companies of the fitness sector, ranked by their total number of members. *Serviocio* tops the ranking, with 111,800 members, although its average number of members per centre is not the highest. This company has the largest total surface area in square metres and is second in the number of centres. *Alta Fit* has the second largest number of members, although the average surface area of its centres is the lowest of the ten companies included in the table. Nevertheless, they have the most centres and the lowest average number of employees per centre.

Table 8 **Characteristics of the ten main companies in the fitness and gym industry according to their number of members in Spain in 2014.**

Company	Members (n)		Surface Area (m^2)		Employees (n)		Number of centres
	Total	Average	Total	Average	Total	By centre	
Serviocio	111,800	3990	132,000	4700	900	30	27
Alta Fit (low cost)	83,300	2450	51,000	1500	272	8	34
Dir	80,000	4500	81,675	4537	1300	72	18
Metropolitan	70,000	3000	100,000	4500	1200	50	22
Go Fit	55,847	5077	55,000	5500	–	–	12
Basic Fit (low cost)	55,479	2920	36,241	1907	250	13	19
Duet Sports	47,245	4295	82,380	6865	–	–	12
O2 Centro Wellness	43,000	3071	80,000	5714	700	50	14
Fitness Place Centre	42,000	2100	80,000	4000	–	–	20
Fundació Claror	40,500	5785	57,600	8229	572	82	7

Source: Research findings based on data obtained from DBK (2015).

[6] *Tercer Informe Gimnasios Low Cost en España* (Valcárcel, López, & García, 2015) analyses the evolution of these centres in the country as a whole; low-cost centres are defined as those centres with maximum monthly dues of 19.99 euros + VAT, although the dues could be 2 to 4 euros higher. This publication reports that in 2014 there were 39 private companies in Spain operating 200 centres. Of these companies, 20 per cent controlled 72 per cent of all fitness centres in Spain.

At the bottom of the Table 8, one can observe that *Fundació Claror* has the fewest number of total members, but the highest average of members and employees per centre. This is somewhat related to the larger amount of square metres in their centres.

Conclusions

This chapter has presented an analysis of the Spanish private sport sector. Compared to the other two sectors that make up the sport industry – the public sector and the voluntary sector – the private sector has not been researched as much, due to the dominance of the public sector in the sport world.

The private sector of the Spanish sport is made up of sport services companies, professional sport clubs, fitness and wellness centres, and gyms. These organisations – integrated within Section 931 of the National Classification of Economic Activities Code – have experienced a 47.3% growth in the last five years, increasing from 16,291 organisations in 2010, to 24,003 in 2015. Together they represent 0.75% of the country's total existing companies. Of these sport organisations, 26% are sole traders, and 74% are companies. Within the latter, the majority are comprised of limited liability companies (36%), while corporations account for a mere 2.1% of the organisations. Out of all the sport organisations, 41.6% have employees, and of those, 41.8% have less than six employees and 15.3% have six to 49 employees. Nearly six out of every ten sport organisations are concentrated in four regions: Catalonia, Madrid, Andalusia, and Valencia.

Instead of analysing the entire Spanish private sport sector, this chapter discussed specific types of organisations such as fitness centres and gyms. These types of private organisations have emerged in the last three decades and subsequently have become successful, leading to noticeable changes in the perception and the meaning of sport for a large amount of the population. A description of the evolution and characteristics of these types of centres in Spain was compiled from the data taken from the DBK report on the Spanish gym sector.

The number of fitness centres and gyms grew at a constant rate between the years 2000 and 2007. Beginning in 2009, a contraction period in the number of centres took place, as a result of the recession. Said contractual phase continues, albeit reduced; as of 2015 there were 3900 fitness centres and gyms. Total revenues increased by almost 8% annually in these centres between 2000 and 2007. Nonetheless, revenue growth slowed starting in 2009, also due to the effects of the recession. Revenues continued plummeting until 2013. Currently, the industry's revenues have reached 825 million euros, which is below the amount obtained in 2005. However, this decline has not been an obstacle in the growth of the number of members and users of those types of centres. In fact, the decline in the total revenues of the fitness centres and gyms was due mainly to the decrease in the membership dues average. Said decline in revenues was a result of downward price pressure created by the *low-cost* centres, rather than due to the reduction in the total number of users of these facilities. This subsector is composed of a large number of small businesses, where many of them are dedicated to the management of just one centre. Along with the small businesses, there are a few holding companies that manage several dozen centres. In any event, this industry is consolidating; the top ten companies hold a 39.3% market share.

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