

# IC Market Tracking®

## Commercial Fitness Equipment Worldwide 2023

# What Do You Get - Your Benefits at a Glance

## Content of the Report

### Market Data, Insights and Expertise...



#### MARKET ANALYSIS

- Historical market data from 2020 – 2023 for the total market development as well as
  - Cardiovascular Systems
  - Strength Systems
  - Distribution Channels
- Forecasts from 2024 – 2026 for the total market as well as for each analyzed market segment and product group
- Annually updates of the data

#### COMPETITION ANALYSIS

- Market shares of the top players for 2022/23e
- Market shares on the total market in Value and Quantity
- Market shares for every product group and segment in value

#### MARKET DRIVERS

- Analysis of the most relevant market drivers such as real GDP change, private consumption, recorded unemployment, Personal Disposable Income, etc.
- Continuous updates of the data



#### Market & Competition Analysis

Market Volume

Market Growth

Trends

Market Shares

# What Do You Get - Your Benefits at a Glance

## Presentation of the Data and Deliverables

### Market Intelligence Tool Access and Deliverables

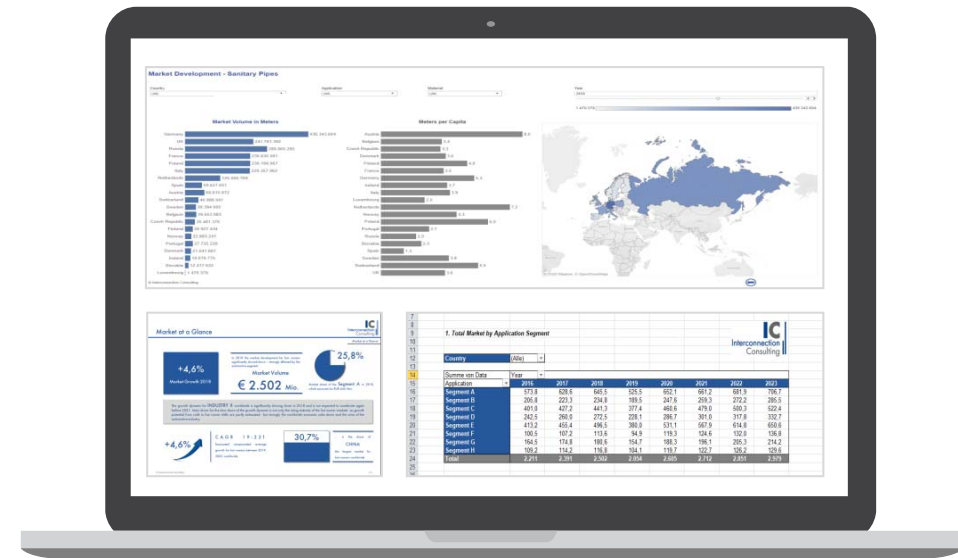


#### ONLINE-COCKPITS

- Online Dashboard-Tool including all data of the report enabling your individual and specific analysis
- User-friendly and intuitive operation of the dashboards
- Online access to the dashboards with all devices (PC, Laptops, Smartphone, Tablet, ...) everywhere, every time
- Download and extract of the data from the dashboards
- Executive report including key facts of the report and background information about forecasts, trends and the competitive landscape
- Infographics summarizing the market and providing regional comparisons and contrasts

#### Raw Data Tables

- Downloadable tables from MIS as .xlsx, .csv, .jpg or other formats for your own integration
  - Graphs
  - Raw Data



#### Market Intelligence Tool and Reports



Online Dashboards

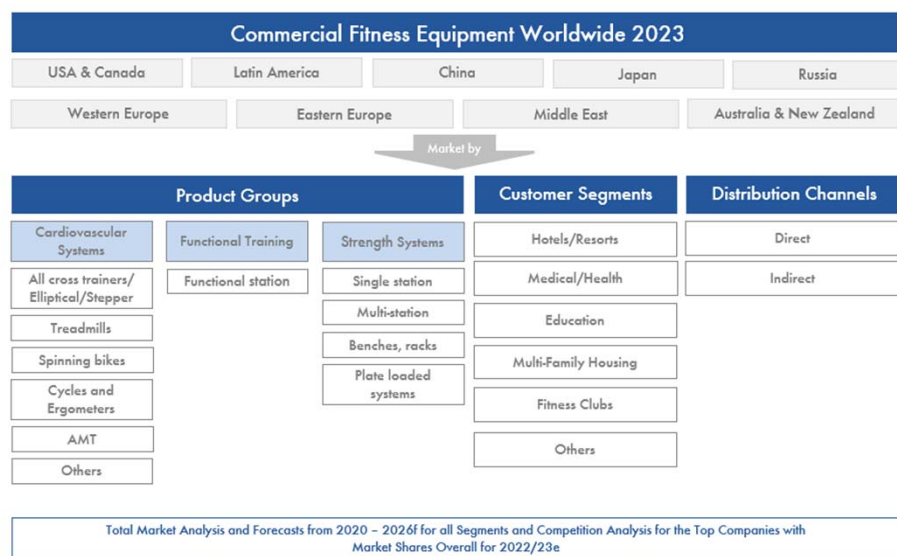
## Commercial Fitness Equipment Worldwide 2023



Product Groups			Customer Segments	Distribution Channels
Cardiovascular Systems	Functional Training	Strength Systems	Hotels/Resorts	Direct
All cross trainers/ Elliptical/Stepper	Functional station	Single station	Medical/Health	Indirect
Treadmills		Multi-station	Education	
Spinning bikes		Benches, racks	Multi-Family Housing	
Cycles and Ergometers		Plate loaded systems	Fitness Clubs	
AMT			Others	
Others				

Total Market Analysis and Forecasts from 2020 – 2026f for all Segments and Competition Analysis for the Top Companies with Market Shares Overall for 2022/23e

# Market Structure - Interpretation



- Market data which include the market development is available for each country separately as well as aggregated for the region package purchased.

- Each country report includes data for three different product groups (Cardiovascular Systems , Functional Systems and Strength Systems) separately as well as aggregated for the total market in terms of value and quantity.

- Each region report includes data for the Distribution channel and Business segment separately as well as aggregated for the total market in terms of quantity.

- Competition Analysis: Market shares of the top companies in the competition analysis are shown for the total market in value and quantity and as well by Product Group for each of the sub-segments mentioned

## Product Group

Spinning bikes

Cycles and Ergometer

All cross trainers  
Elliptical/Stepper

Treadmills

AMT

Others

## Cardiovascular Systems

All forms of spinning machines

All kind of upright and recumbent bikes

All (or combinations of) cross trainers, ellipticals and stepping machines

All kind of running machines

Adaptive Motion Trainer

Rowing machines, stair climbers, stretchers, arm ergometers, exotic machines, new innovations, combinations (tread climber, etc.)

## Product Group

Single station

Multi-station

Plate loaded systems

Benches/Racks

## Product Group

Functional Station

## Strength Systems

Stations with a single cable, stack loaded, single usage

Stations with multiple cables, stack loaded (or stack and plate loaded), multiple usage

Single or multiple usage, purely plate loaded (e.g.: Leg press)

Strength systems such as benches, racks, etc.

## Functional Training

Training Systems for Functional Training: sectorized and cable-based training equipment; functional training zones

\*Not included: Mini steppers, dumbbells, individual plates/bars and other accessories

## Segments

Fitness Clubs

Budget Clubs (50% cheaper than Non-Budget Clubs, e.g.: Mc Fit),  
Non-Budget Clubs (e.g.: Holmes Place, Equinox, etc.)

Hotels/Resorts

Spas, resorts or hotels with fitness clubs

Medical Health

Medical facilities, rehabilitation centers, hospitals, etc.

Education

Equipment for school gyms, as well as for colleges and universities

Multi-Family Housing

Equipment for fitness facility in a multi-family building

Others

Commercial fitness equipment for training in the army, other segments

## Distribution Channels

Indirect

Sales via a system of expert distributors

Direct

Sales direct to the end user, by own sales rep. or Internet, etc.

## Regions

Western Europe

Germany, France, Spain, Italy, UK, Northern Europe, Austria, Switzerland, Benelux

Eastern Europe

Hungary, Czech Republic, Slovakia, Slovenia, Croatia, Poland, Romania, Bulgaria, Baltic States

Middle East

Saudi Arabia, Kuwait, Bahrain, Qatar, United Arab Emirates

USA & Canada

Latin America

Russia

Japan

China

Australia & New Zealand



# The Unique Mix of Methods and Approaches for Reliable Market Analysis



## SELL-IN

The analysis measures Sell-In data. Sales from the manufacturer to the first distribution partner. OEMs are not taken into account.



## Survey with Manufacturer & Experts

Basis of the analysis are surveys - electronic questionnaires and telephone interviews - with the most important manufacturer as well as interviews with industry experts.



## Market Calculation Model

Industry relevant market drivers are taken into account in a market calculation model to determine the total market volume and forecasts.

The strong focus on interviews within the industry is clearly our **USP**  
“Only who talks with the industry knows what’s going on!”

# The Market Intelligence Tool

## Dashboards - The Best Way to Work with Data

A picture says more  
than 1000 words

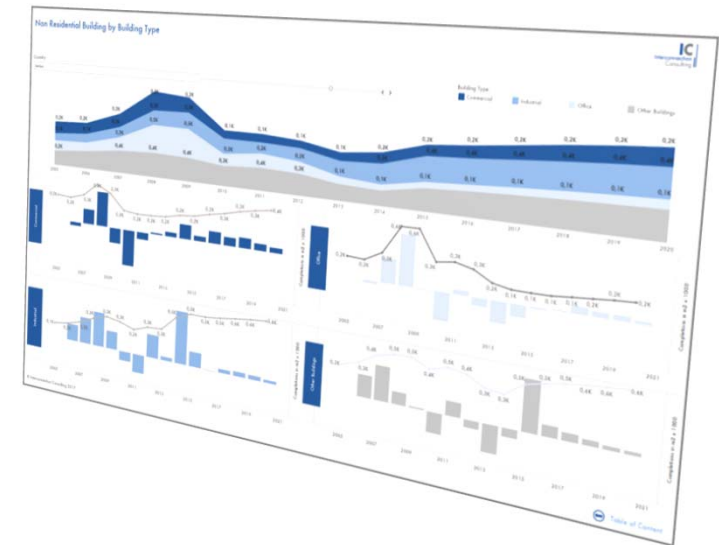
- Complex correlations are visualized in the form of geo-, tree maps, bars etc.

Interactive Dashboards

- Use interactive dashboards for quick implementation of the data, for potential estimations, for sales control, for success measurement etc.

Easy online  
accessibility

- Market data are available wherever you have internet access
- You can also export the data as .jpg, .csv or .pdf file



*In case of purchase exceeding € 5.000,- (net), the price of Tableau cockpit is waived as well as for any subscription order exceeding 2 countries or regions. For all other options, price for Tableau cockpit costs € 500,-.*

# Ease of use of the Market Intelligence Tool

Let's show a video ...



# Sample Cockpits for Market Competition Data

## Competition Market Shares in Terms of Quantity

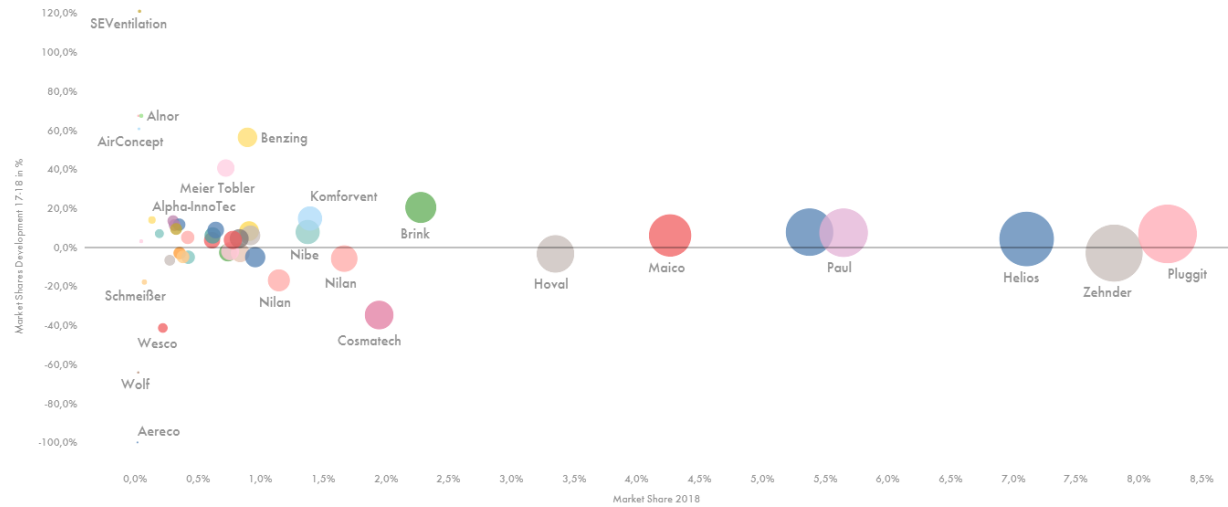
Country: [Multiple values]

Product Group:  (All)  Central HRV  Exhaust Ventilation  Local HRV

Ranking Portfolio: 1 to 40

Highlight Company: [Highlight Company]

IC Dynamic Portfolio



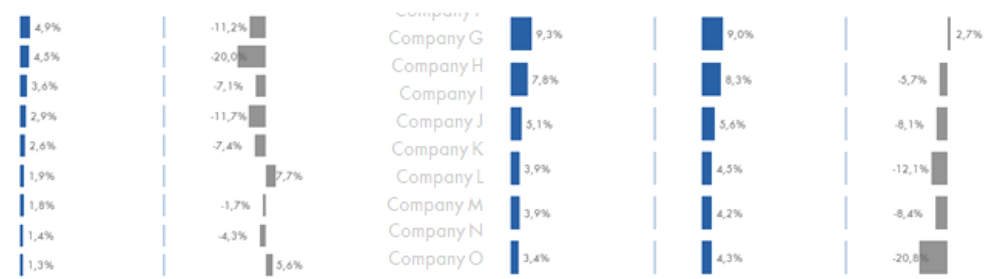
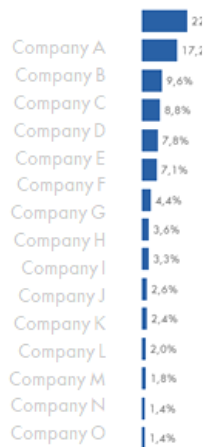
- Company - Quantity
- 7Air
- Aereco
- Air-On AG
- Air-Concept
- Airflow
- Aldes
- Alnor
- AlphaInnoTec
- Alvotech
- Balzer
- Benzing
- Blauberg
- BluMartin
- Brink
- Cosmatech
- Dantherm
- Drexel & Weiss
- Egokiefer
- Exhausto
- Fränkische Ro...
- geAir
- Glen Dimplex
- Halmburger
- Helios
- Hoval
- Inventer
- Junkers
- Kamforvent

## Competition Ar

Ranking: 1

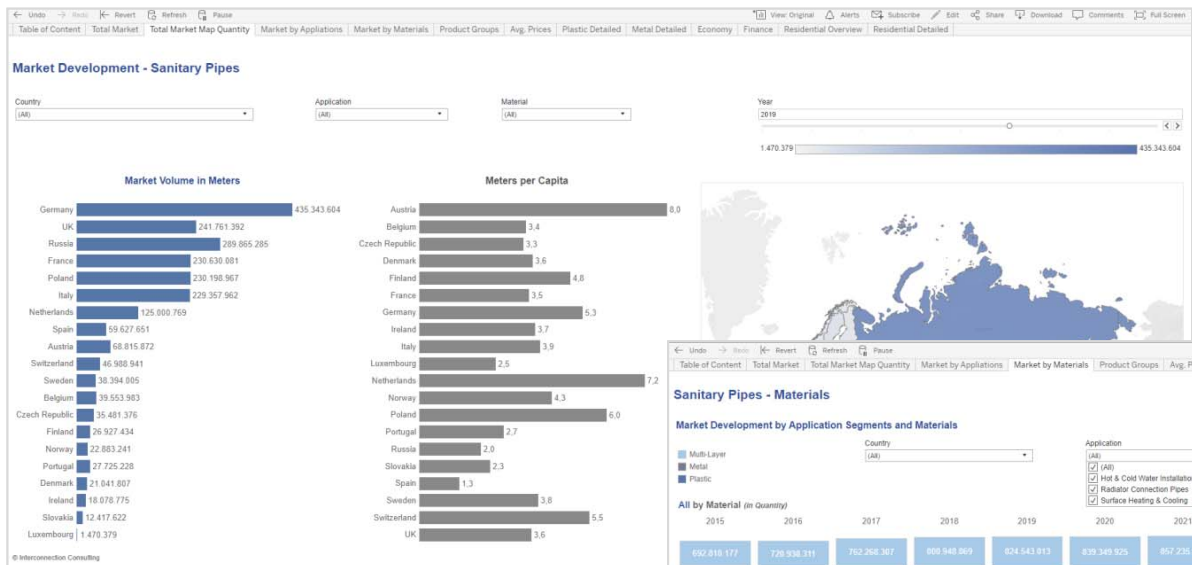
Business Segment: New Construction

2018

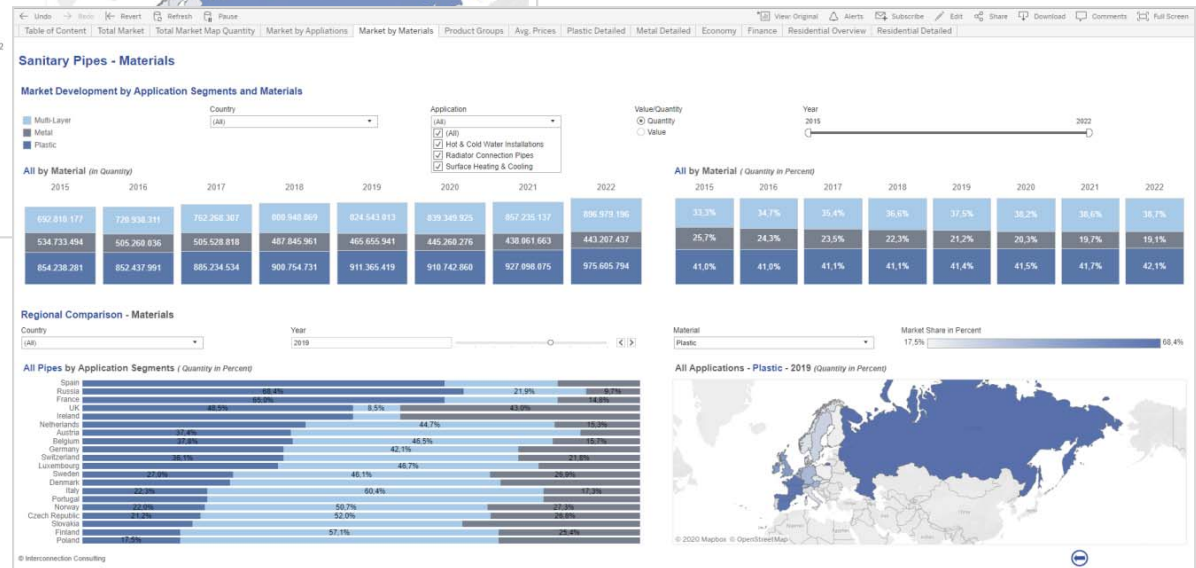


*This chart shows fictitious numbers*

# Sample Cockpits for Market Analysis Data

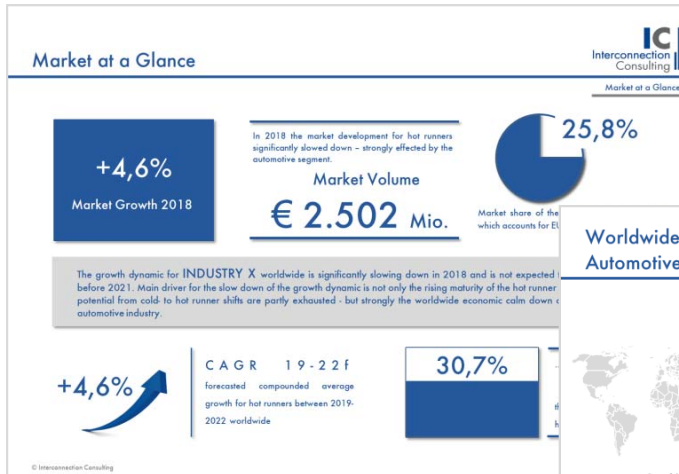


*This chart contains fictive data*

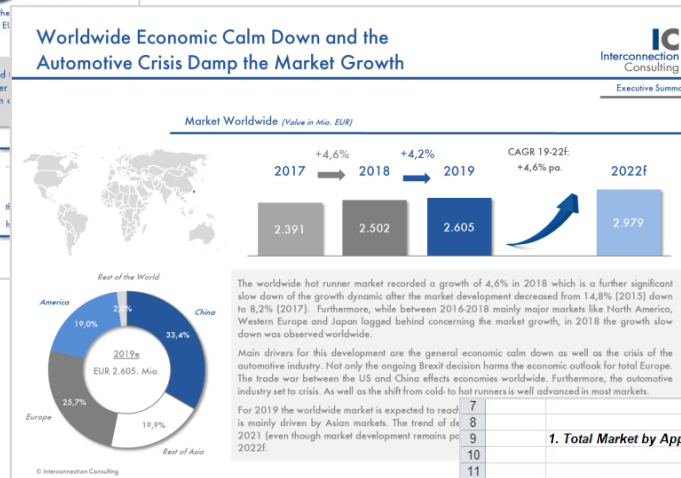


# Additional Deliverables

## Executive Summary and Pivot-Tables



Executive Summary as PDF (fictive data)



Executive Summary as PDF (fictive data)

**1. Total Market by Application Segment**

Country	(Alle)	2016	2017	2018	2019	2020	2021	2022	2023
Segment A		573,8	628,6	645,5	525,5	652,1	661,2	681,9	706,7
Segment B		205,8	223,3	234,8	189,5	247,6	259,3	272,2	285,5
Segment C		401,0	427,2	441,3	377,4	460,6	479,0	500,3	522,4
Segment D		242,5	260,0	272,5	228,1	286,7	301,0	317,8	332,7
Segment E		413,2	455,4	496,5	380,0	531,1	567,9	614,8	650,6
Segment F		100,5	107,2	113,6	94,9	119,3	124,6	132,0	136,8
Segment G		164,5	174,8	180,6	154,7	188,3	196,1	205,3	214,2
Segment H		109,2	114,2	116,8	104,1	119,7	122,7	126,2	129,6
<b>Total</b>		<b>2.211</b>	<b>2.391</b>	<b>2.502</b>	<b>2.054</b>	<b>2.605</b>	<b>2.712</b>	<b>2.851</b>	<b>2.979</b>

Pivot-Table including all raw data as MS-Excel file (fictive data)

# Investment Plan for Your Market Research

	Subscription *	Single Issue
Single Report, 1 Region	€ 2,999.-	+25% for Single Issues
Total Worldwide Report, all Regions	€ 17,899.-	



\* **Subscription:** 25% price advantage compared to single issue. The subscription can be cancelled after two purchases of the study, but not later than 31st December in the year in which the last study has been received. If the subscription is not cancelled, it is extended by one more year. The price is the individual price for at least two orders of the study (order year and the following year). Price changes must be announced by Interconnection at least six weeks before 31st December.

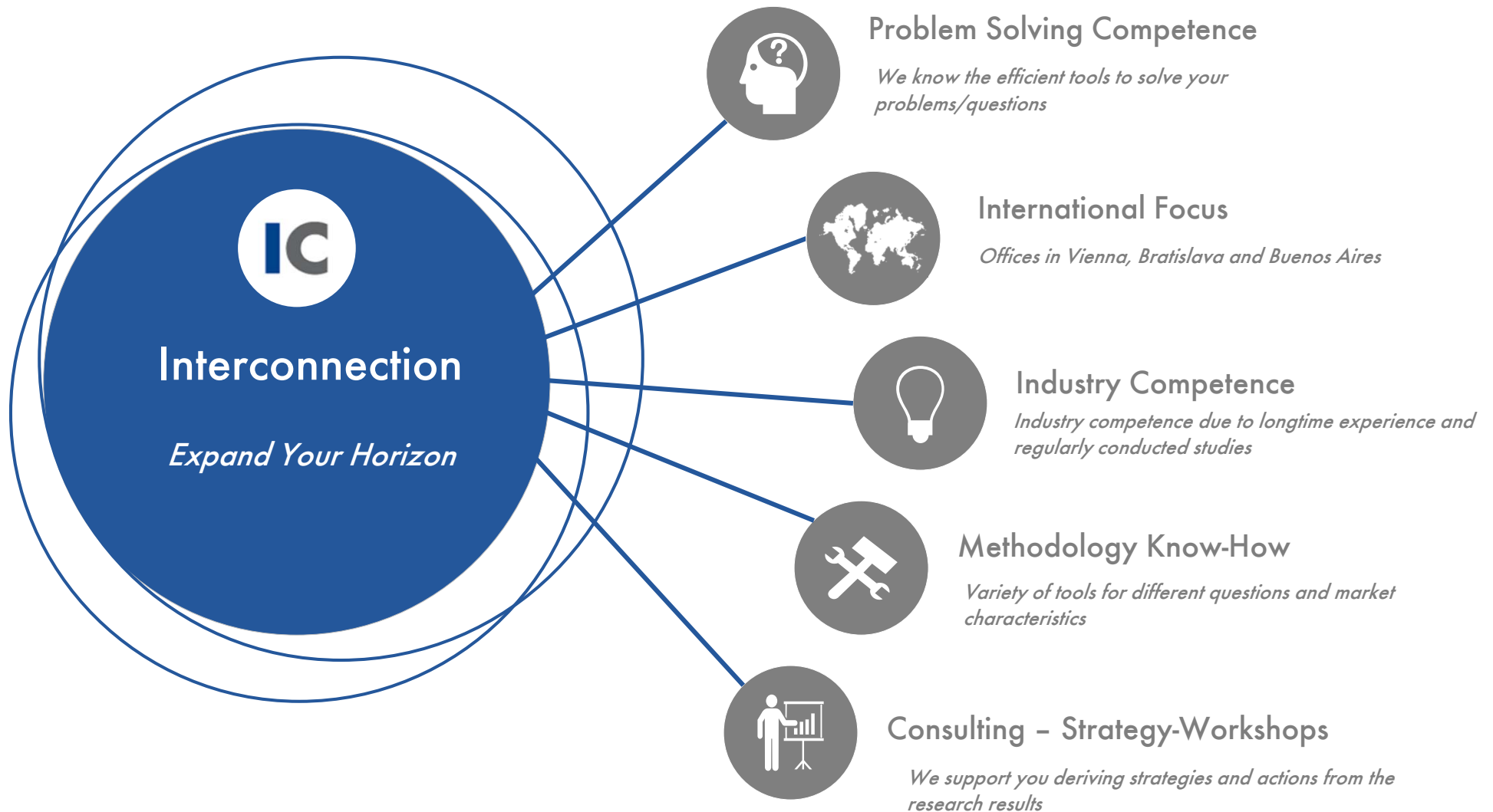
The license costs for Tableau Cockpit Software are included from an order value of € 5,000 (net) and with every order for an annual subscription for more than 2 countries or regions. For all other options, the price for the Tableau Cockpit is € 500 / license.

# Selected References

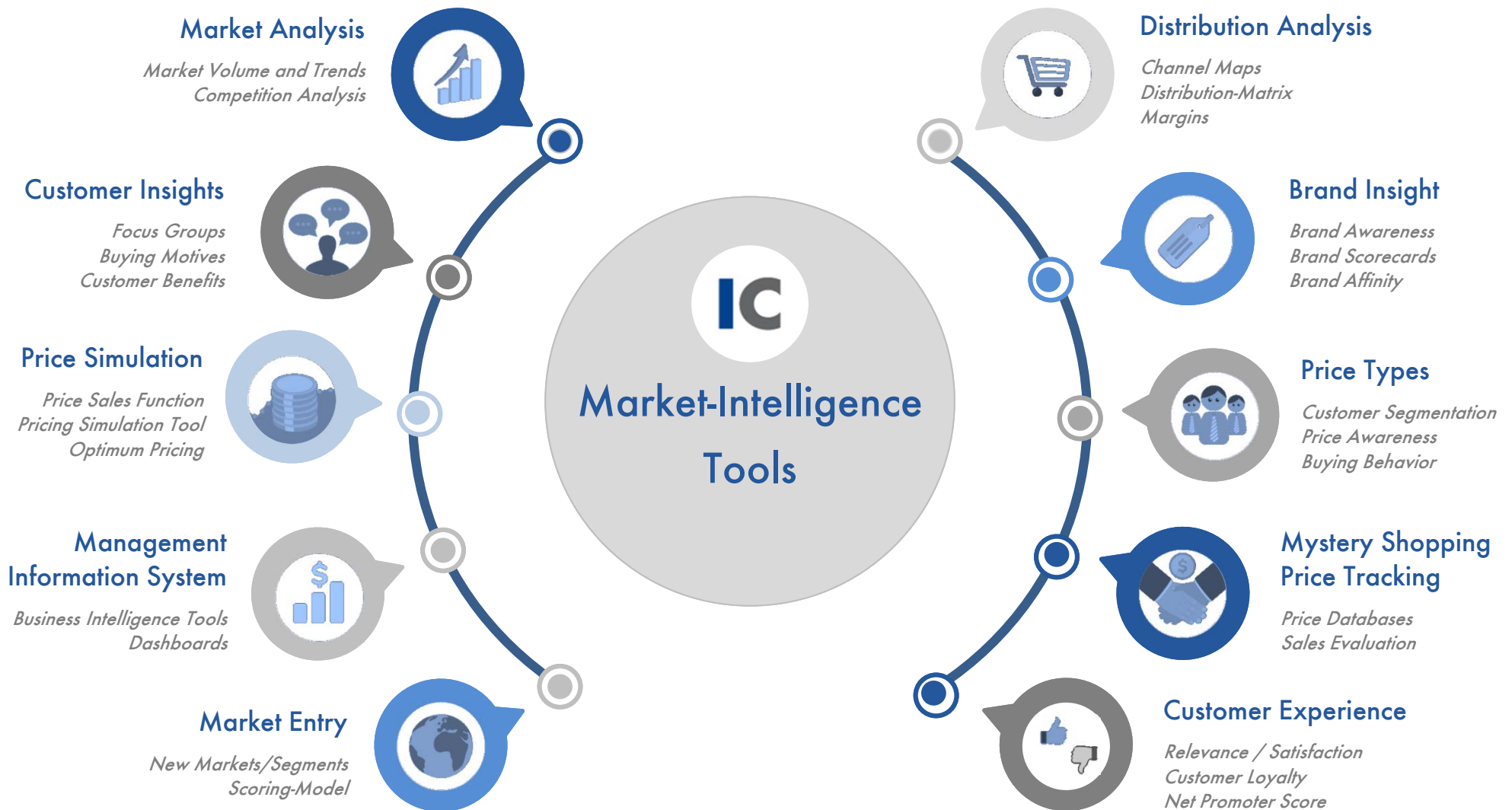




# Interconnection Provides Data for Corporate Decisions



# Our Market-Intelligence Tools



For further questions,  
please do not hesitate to contact us!

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**IC**

we show you the way

**Yes, we would like to order the  
IC Market Tracking® Commercial Fitness Equipment  
Worldwide 2023**

(Please, print out the order form and mark your desired products)

Please choose from the available regions and package selection

- |  |   |  |
|--|---|--|
| <input type="checkbox"/> Russia                    | <input type="checkbox"/> Western Europe | <input type="checkbox"/> China         |
| <input type="checkbox"/> Australia and New Zealand | <input type="checkbox"/> Eastern Europe | <input type="checkbox"/> Latin Amerika |
| <input type="checkbox"/> USA & Canada              | <input type="checkbox"/> Japan          | <input type="checkbox"/> Middle East   |

- |   |              |
|---|--------------|
| <input type="checkbox"/> Single Issue, 1 Region* .....              | EUR 2.999,-  |
| <input type="checkbox"/> Total Worldwide Report, all Regions* ..... | EUR 17.899,- |

	Single Issue	Subscription*
25% Discount		✓
IC Cockpits – Online Dashboard Solution	✓	✓
Full flexibility - Within the price of the annual subscription, available regions can be exchanged without additional costs		✓
Free webconference with the analyst		✓

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 VAT Nr: \_\_\_\_\_ E-mail: \_\_\_\_\_

Date	Name	Signature
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If you are interested in a single issue, please contact the analyst in charge.

#### Terms of payment

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In the case of a single issue (no subscription price advantage), the contract is valid for 12 months.

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