

European Health & Fitness Market Report 2025

In-depth analysis of market developments, countries,
leading operators and consumer trends

€36.0

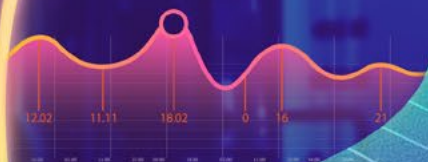
€32.8

71.6

67.7

64,550

63,430



Preface	5
The European Fitness Market at a Glance	6
Methodology	11
Overview of the European Fitness Ecosystem	18
EuropeActive Consumer survey	21
Snapshots of selected Ecosystem segments	41
M&A and investment activities	56
Deep Dive into the European Operator Landscape	63
Major European fitness club operators	64
Profiles of selected fitness club operators	69
Development of the European Fitness Market	110
Market overview	110
Country spotlights	112
Selected European country profiles	115
Industry View by Sander van den Born, Purpose Brands	142
About EuropeActive	144
EuropeActive Event Calendar	145
About Deloitte Sports Business Group	147
Your contacts	150

The European Fitness Market at a Glance

On behalf of EuropeActive and Deloitte, we welcome you to the twelfth edition of the European Health & Fitness Market Report (EHFMR) covering the calendar year 2024. This report represents the fourteenth joint publication with Deloitte and reflects EuropeActive's effort to further strengthen its position as the knowledge center of the European health & fitness sector by providing reliable and sound market data.

This report is the most comprehensive piece of research on the European health & fitness market, but it is still only a step towards more transparency and knowledge on the sector. Further professionalization of market research is still needed. Any feedback you have would be much appreciated, as it is only with the collaboration of all market participants that we can obtain quality information to help ensure growth in our sector and achieve our goal of 100 million members in Europe by 2030!

A big thank you from our side to all operators, suppliers, intermediaries, market experts, and associations who have assisted in this report. Our analysis would not have been possible without their support and that of the sponsors.

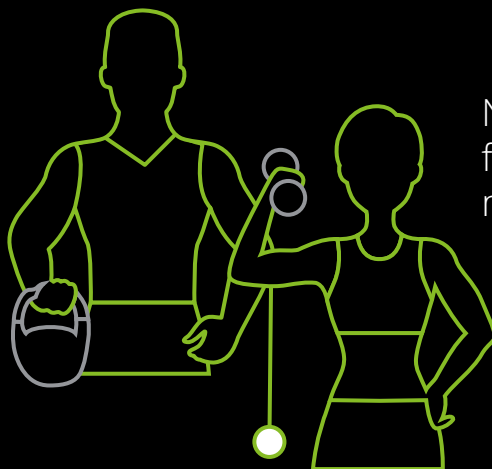
We trust you will find reading this report valuable.
Sincerely,



Herman Rutgers
EuropeActive
Ambassador

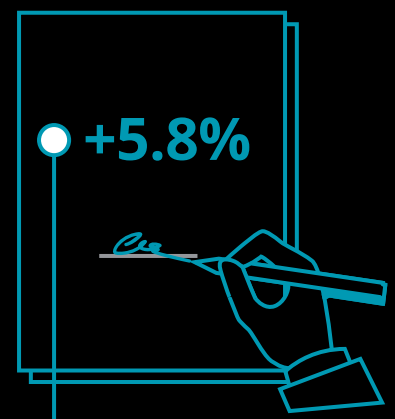


Karsten Hollasch
Deloitte
Partner

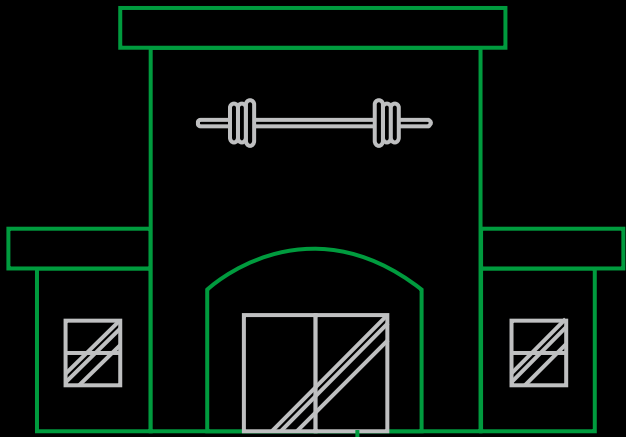


Number of
fitness club
members

71.6 million



Membership
change¹



Clubs
64,550



18.8 million

Members of top 20 operators



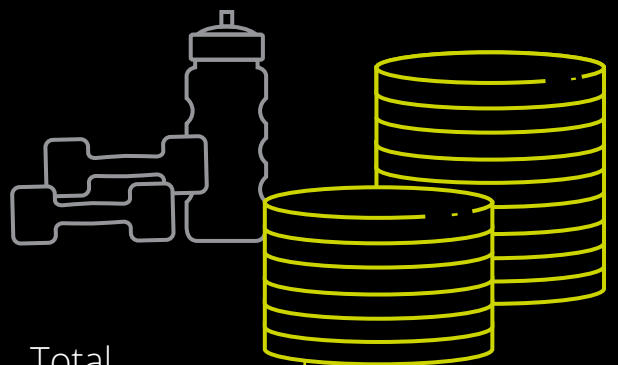
Club change¹
+1.8%

M&A deals

30



8.9% (total)
10.6% (aged 15+)
Penetration rate



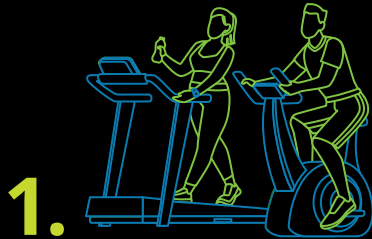
Total revenues

€36.0 billion

Note: 1) Relative changes compared to previous year calculated on adjusted 2023 KPIs due to restatements
Source: Deloitte analysis



Key Takeaways from Consumer Survey



1.

While the share of regular fitness practitioners in the overall population significantly increased after the end of the COVID-19 pandemic in 2023 (+5pp vs. 2022), it has seen further moderate growth since then (2025: +3pp vs. 2023).



2.

Next to the positive changes in the overall level of regular fitness activity, the breakdown of fitness setting usage has changed significantly towards club usage in recent years. In 2025, for the first time since 2022, the fitness club (+17pp since 2022) is used by as many regular fitness practitioners as home workouts (-14pp since 2022). This shift may come along with a general increased interest in strength training across fitness practitioners.



3.

Across selected European metropolitan areas, there is a slightly higher proportion of regular fitness practitioners compared to the overall national sample. Also, the rate of fitness club users tends to be somewhat higher in these metropolitan areas than in the overall country, which is in line with the usually larger density of fitness clubs in urban regions compared to smaller agglomerations.



4.

Among regular fitness practitioners who work out at a fitness club, an underlying interest in the capabilities of their fitness club operator's app offering can be identified. Whenever a fitness club operator provides a proprietary app, the numbers show significant conversion rates among regular fitness practitioners in terms of app downloads and usage.



5.

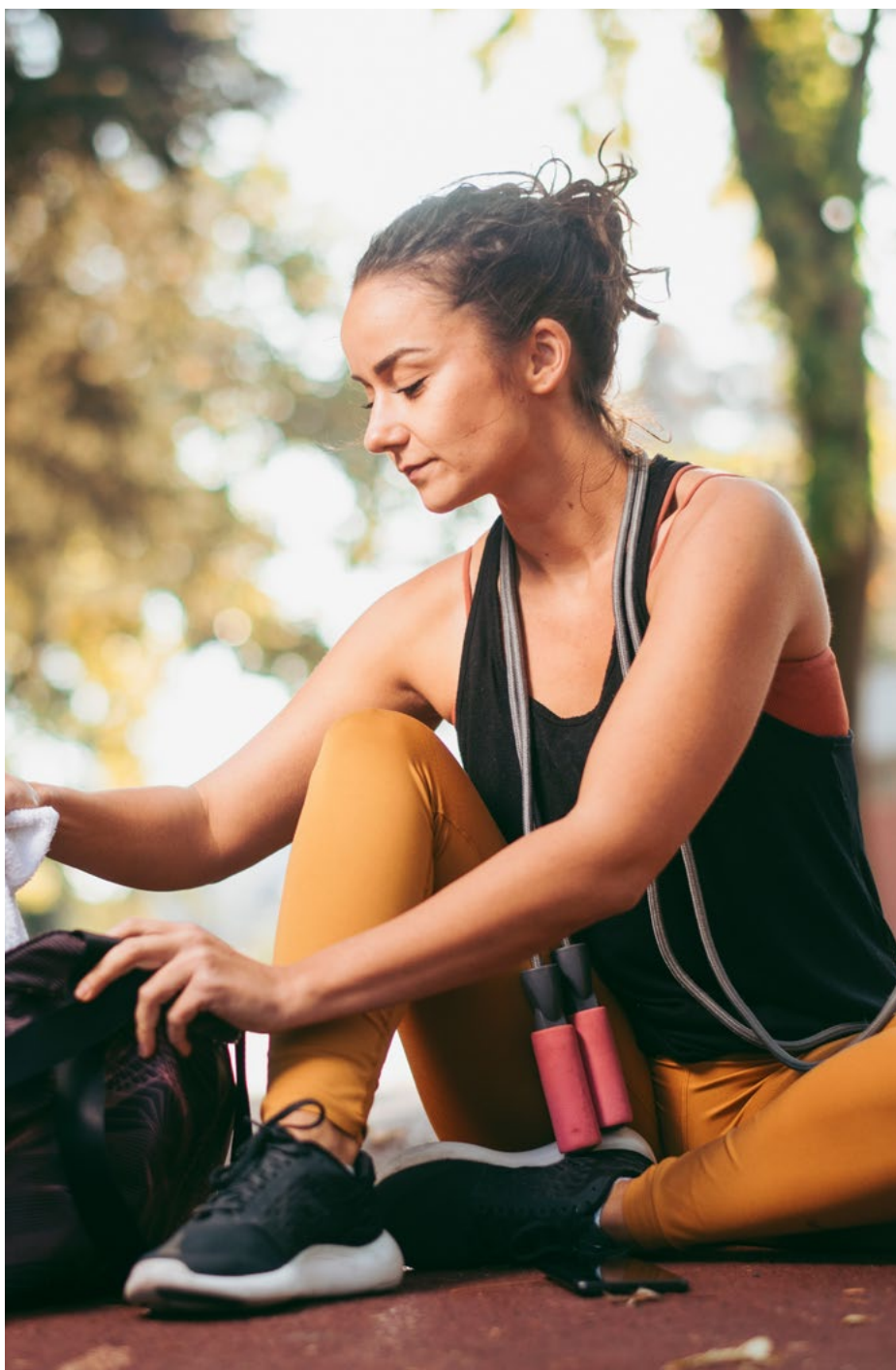
From the consumer's point of view, the most important factor in choosing their fitness club has changed from price to location, as inflationary pressures on consumers have somewhat eased compared to last year. However, price remains a key factor for consumers, followed by the value they get for their money, opening hours and quality of equipment.



6.

People with a regular fitness routine are much more likely to indicate a high level of physical and emotional wellbeing compared to those without a regular fitness routine, while attributing wellbeing directly to physical activity, sleep and eating habits.

M&A and investment activities



In 2024, a total of 30 transactions were recorded in the area of brick-and-mortar club operators (i.e., companies that operate stationary fitness clubs), in the course of which over 669 clubs were transferred. The acquired businesses are geographically distributed across 14 countries (AT, BE, BG, DE, ES, FR, IT, LT, NL, NO, PL, PT, SE, UK).

For this report, we have only considered transactions that involved European brick-and-mortar fitness companies and in which a minimum of four gyms as well as at least 50% of the target's shares were acquired.

Tab. 2 – Selected mergers and acquisitions in 2024

Date	Company	# of Clubs	Country	Seller	Acquirer
Jan	MA Holding GmbH	19	Germany	MA Holding GmbH	LifeFitGroup MidCo GmbH
Feb	Kalorias	6	Portugal	Kalorias	SC Fitness
	Arendse Group BV	6	Netherlands	Private Investor(s)	Value Enhancement Partners BV
Mar	VS Fitness	8	Lithuania	Private Investor(s)	MyFitness Group
	RSG Group Espana SL	47	Spain	RSG Group GmbH	Basic-Fit
Apr	VivaGym Group	104	Spain	Bridges Fund Management	Providence Equity Partners
	Good Luck	4	Poland	Good Luck	Benefit Systems SA
	purfitness	6	Germany	purfitness	all inclusive Fitness
May	Health Clubs	5	France	Ladjal Group	LC Fitness Holding
	Simply Gym	4	United Kingdom	Bay Leisure	JD Gyms Group
	Star Gym	22	Sweden	Star Gym	Nordic Wellness
	EasyFit	8	Norway	EasyFit	Feel24
Jun	Holmes Place Spain	5	Spain	Basic-Fit	Weon SL
Jul	Smartfit Gestion SL	10	Spain	Smartfit Gestion SL	VivaGym Group
Aug	Sporty24 Norge AS	22	Norway	Sporty 24 Norge AS	Norsk Treninghelse AS
	Macro Fit	8	Spain	Macro Fit	VivaGym Group
	Fitness Flais	12	Bulgaria	Private Investor(s)	Benefit Systems SA
Sep	LifeFit Group MidCo GmbH	140	Germany	Oaktree Capital Management	Waterland Private Equity Investments BV
	MoreFit	8	Austria	MoreFit	FIT/ONE
Oct	Gymet Sverige	4	Sweden	Gymet Sverige	Nordic Wellness
	Buena Vista Fitnessclub GmbH	5	Germany	Private Investor(s)	LifeFit Group MidCo GmbH
	Gymbox Ltd	9	United Kingdom	Business Growth Fund Ltd	Urban Gym Group BV
	Organic Fitness	8	Poland	Organic Fitness	Benefit Systems SA
Nov	MyLifeStyleClub GmbH	15	Germany	MyLifeStyleClub GmbH	LifeFit Group MidCo GmbH
	OneFit Unlimited BV	4	Spain	OneFit Unlimited BV	VivaGym Group
	Egosistema Spa; Orange Torino SRL	21	Italy	Private Investor(s)	VAM Investments SpA
	Altafit	70	Spain	MCH Private Equity	VivaGym Group
	Wellness Studio	29	Sweden	Private Investor(s)	STC
Dec	Body Built SL (Fitup)	20	Spain	Body Built SL	VivaGym Group
	NRG Fitness	40	Belgium	Private Investor(s)	JIMS NV

■ Top 3 transactions by number of clubs

Sources: Mergermarket, MAJUNKE Consulting, Fitness News Europe, Company information, EuropeActive, Deloitte analysis

Other relevant transactions in the fitness sector

In addition, several acquisitions of one to three clubs by European operators took place during the year, including three LifeCity clubs acquired by Dutch operator Fit for Free and Fast Fitness Japan acquiring Eighty-8 Health & Fitness GmbH, the German master franchisee of Anytime Fitness, which operates one club in Gütersloh.

Outside Europe, some relevant transactions took place involving major fitness chains with European operations, such as

- the merger of US-based fitness, health and wellness operators Self Esteem Brands and Orangetheory Fitness, creating Purpose Brands with a combined portfolio of brands including Anytime Fitness, Orangetheory Fitness, Waxing the City, BasecampFitness/SUMHIIT Fitness and The Bar Method, and
- the acquisition of US-based Blink Fitness, with 67 locations in New York and New Jersey, by UK-based fitness operator PureGym.

Note: Due to the definition of M&A transactions used in this report, these transactions are not included in the overview or in the total number of 30 deals recorded.



Association

DSSV e. V. – Arbeitgeberverband
deutscher Fitness- und
Gesundheits-Anlagen



Germany



Recent market events
selected/illustrative

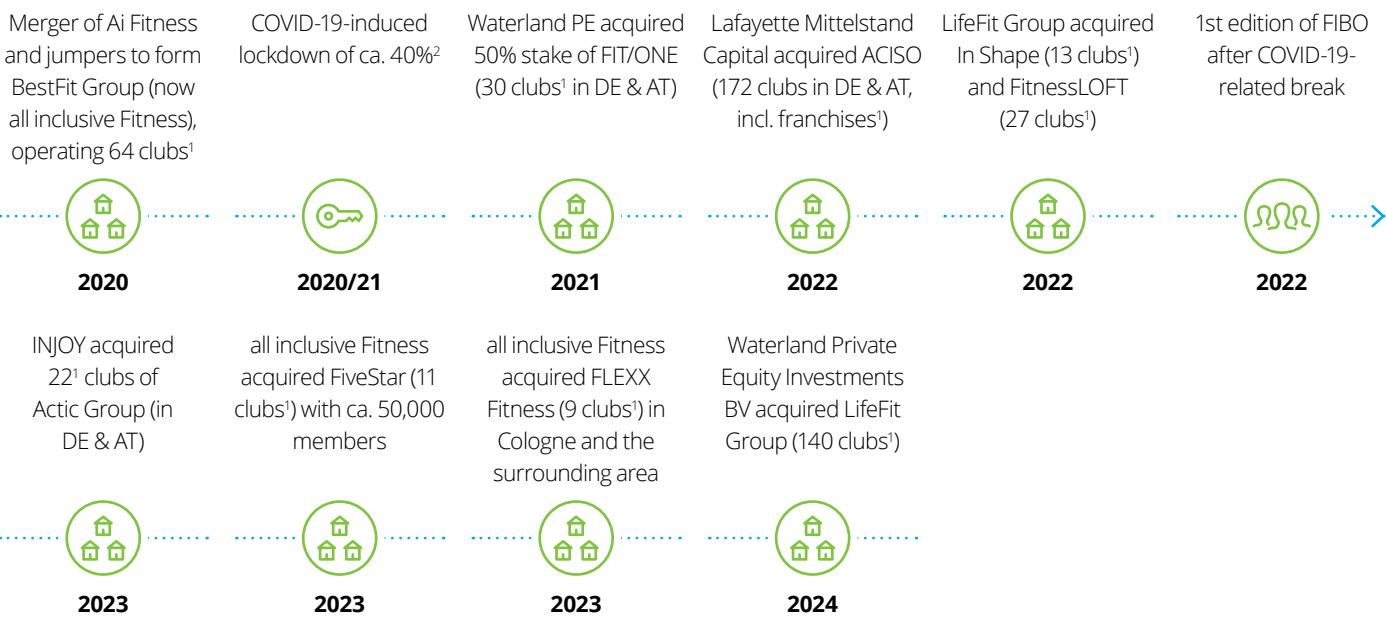
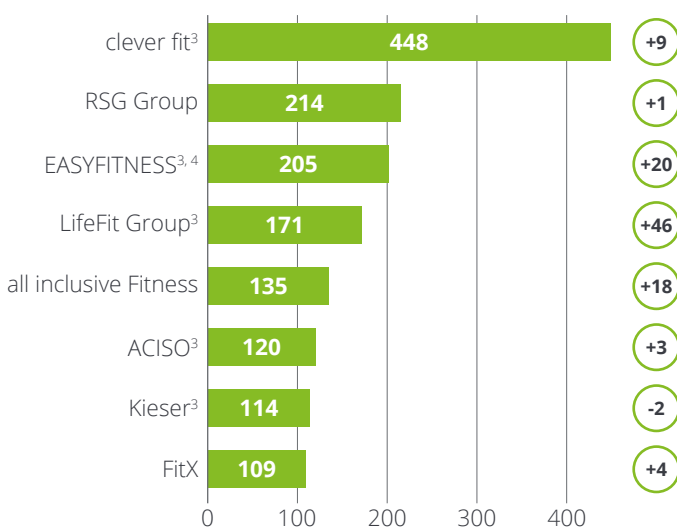


Fig. 53 – Largest operators by number of clubs



■ 2024

Fig. 54 – Further selected fitness market participants

Company/brand	Segment	Further information
Bodystreet ³	Special-interest	240 clubs (-11)
Mrs.Sporty ³	Special-interest	93 clubs (-27)
Urban Sports Club	Intermediary	B2B & B2C
Wellhub (formerly Gympass)	Intermediary	B2B only
Hansefit (part of Epassi)	Intermediary	B2B only
EGYM Wellpass (formerly qualitrain)	Intermediary	B2B only

Notes: 1) At the time of the transaction; 2) Clubs are considered closed for 50% of the month if club closures have occurred in significant parts of the country and/or for a large period of the month; 3) Fully or partly a franchise operation; 4) Including EMS clubs

Sources: Public information, market experts, unaudited company information, Deloitte analysis

European Health & Fitness Market Report 2025

Report as of 31 December 2024

Publisher: EuropeActive

Authors: Herman Rutgers, Karsten Hollasch, Stefan Ludwig, Steffen Gaussemann,
Jakob Papenbrock, Mandy Brockscothen, Philipp Weber

Publication date: April 2025

Price: €299 (excluding VAT)

For EuropeActive members: 30% discount

Please order via www.europeactive.eu

All rights reserved. Nothing in this publication may be duplicated, stored in an automated data file, or made public, in any form, whether electronic, mechanical, by means of photocopies, or in any other way, without prior written consent from EuropeActive.

Your contacts



Herman Rutgers
Ambassador
EuropeActive
herman@h Rutgers.eu



Kai Troll
CEO
EuropeActive
kai.troll@europeactive.eu



Emilia Happel
Partnerships Manager
EuropeActive
emilia.happel@europeactive.eu



Karsten Hollasch
Partner
Deloitte
Financial Advisory
khollasch@deloitte.de



Stefan Ludwig
Partner
Deloitte
Head of Sports Business Group
sludwig@deloitte.de



Steffen Gaussemann
Senior Manager
Deloitte
Sports Business Group
sgaussemann@deloitte.de



Deloitte refers to one or more of Deloitte Touche Tohmatsu Limited (DTTL), its global network of member firms, and their related entities (collectively, the "Deloitte organization"). DTTL (also referred to as "Deloitte Global") and each of its member firms and related entities are legally separate and independent entities, which cannot obligate or bind each other in respect of third parties. DTTL and each DTTL member firm and related entity is liable only for its own acts and omissions, and not those of each other. DTTL does not provide services to clients. Please see www.deloitte.com/de/UeberUns to learn more.

Deloitte provides industry-leading audit and assurance, tax and legal, consulting, financial advisory, and risk advisory services to nearly 90% of the Fortune Global 500® and thousands of private companies. Legal advisory services in Germany are provided by Deloitte Legal. Our people deliver measurable and lasting results that help reinforce public trust in capital markets, enable clients to transform and thrive, and lead the way toward a stronger economy, a more equitable society and a sustainable world. Building on its 175-plus year history, Deloitte spans more than 150 countries and territories. Learn how Deloitte's approximately 457,000 people worldwide make an impact that matters at www.deloitte.com/de.

This communication contains general information only, and none of Deloitte GmbH Wirtschaftsprüfungsgesellschaft or Deloitte Touche Tohmatsu Limited (DTTL), its global network of member firms or their related entities (collectively, the "Deloitte organization") is, by means of this communication, rendering professional advice or services. Before making any decision or taking any action that may affect your finances or your business, you should consult a qualified professional adviser.

No representations, warranties or undertakings (express or implied) are given as to the accuracy or completeness of the information in this communication, and none of DTTL, its member firms, related entities, employees or agents shall be liable or responsible for any loss or damage whatsoever arising directly or indirectly in connection with any person relying on this communication. DTTL and each of its member firms, and their related entities, are legally separate and independent entities.