



European
Health & Fitness
Market Report 2024



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Pre f a c e

Moving Forward Together

As we come together again for the EHFF and FIBO in Cologne we will be marking and celebrating some significant milestones achieved since last April. First of all, the data presented in this market report clearly indicate a strong upward trend in our market all over Europe, and steadily growing consumer demand for fitness and wellness services across the continent. Our sector's market valuation for 2023, based on fitness club memberships and revenues, has surpassed the pre-pandemic record, and we are now at almost 68 million fitness and health club members in Europe, a historic record.

This positive market trend is echoed in the fact that FIBO, the world's leading summit and tradeshow for our industry, is expected to reach close to its record high of around 150,000 visitors before the Corona pandemic. And the European Health & Fitness Forum (EHFF), which takes place the day before the official opening of the FIBO tradeshow, reached its highest number of participants yet.

Furthermore, for the first time, the European DataHub, the future digital data collection engine of THiNK Active, EuropeActive's research center, is finally at a development stage where it can contribute market data to the European Health & Fitness Market Report (EHFMR), and thereby strengthen the data base.

The European DataHub, representing next-generation digital market data collection for our sector, will also contribute data to the social return on investment (SROI) project that THiNK Active is developing with the WHO Global Physical Activity Unit in

Geneva, and to the social-economic impact study THiNK Active publishes annually around the EHFF.

The European DataHub project was one of many visionary initiatives and projects for the sector's future that EuropeActive launched 2020 – 2023 with the dedicated support of our President's Council Members and Vanguard Partners. We are truly grateful for this committed, generous support for EuropeActive, during a challenging time for the industry, to lead substantial renewal in critical areas, like data-collection and research, that are essential to our sector becoming a generally recognised solution to common public health challenges.

Accurate data evidencing our market and our sector's development is essential to the solidity of the decision-making of our industry's leaders, to attracting large-scale external investment for growth and innovation in our sector, and it is decisive to our sector's ability to effectively influence political decision-making.

Our ability to factually evidence our sector's size and impact in society when it comes to public health and socio-economics is crucial to the success of our public affairs efforts in Brussels and in the national capitals of Europe. There is a direct link between data-based research and the effectiveness of our political representation and public affairs efforts for industry associations like EuropeActive.

That is why we are genuinely excited about the way The European DataHub project, developed by EuropeActive, THiNK Active and 4Global, will bring our data-collection

for the industry substantially into the future, and ensure that this report remains the 'gold standard' of market research for the fitness and physical activity sector. Thanks to the support of our President's Council for Operators, we were able for the 3rd consecutive year to conduct thorough consumer research in 19 European countries, totaling almost 11,000 consumers, thus showing some clear trends, which are reflected in this report.

Without further ado, I hope you will enjoy reading this European Health & Fitness Market Report, which traditionally has been the most sought-after publication for decision-makers in our industry in Europe. I would like to profoundly thank the Deloitte team and EuropeActive Ambassador Herman Rutgers for once again leading the work on this foremost report so diligently for us. And finally, a huge thank you to our publication sponsors,

Basic-Fit, BHOUT, DHZ Fitness Europe, FIBO, Les Mills, LifeFitness, Myzone, PerfectGym, Technogym

Thank you for making the European Health & Fitness Market Report 2024 possible!

Andreas Paulsen
CEO of EuropeActive



The European Fitness Market at a Glance

On behalf of EuropeActive and Deloitte, we welcome you to the eleventh edition of the European Health & Fitness Market Report (EHFMR) covering the calendar year 2023. This report represents the thirteenth 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.

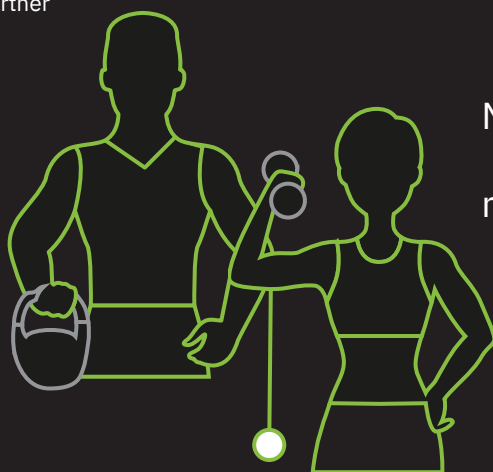
We trust you will find reading this report valuable.
Sincerely,



Herman Rutgers
Europe Active
Ambassador

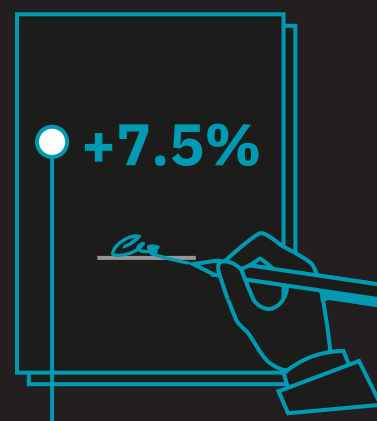


Karsten Hollasch
Deloitte
Partner



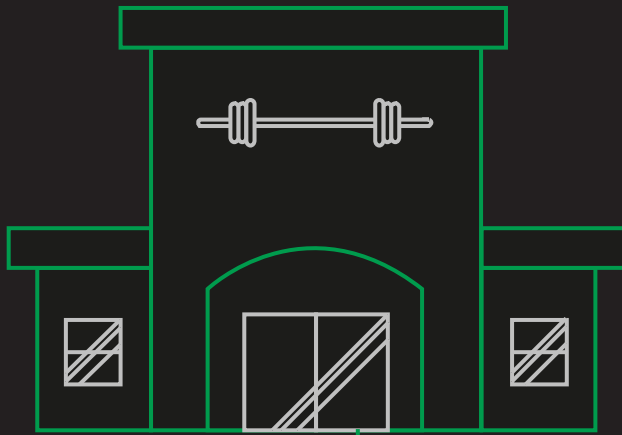
Number of
members

67.6 million



Membership
change¹

Note: 1) Relative changes compared with previous year calculated on adjusted 2022 KPIs due to restatements Source: Deloitte analysis



Clubs
64,970



17.4 million

Members of
top 20 operators



Club change¹
+1.4%

M&A deals

12



8.4% (total)
10.1% (15+)
Penetration rate

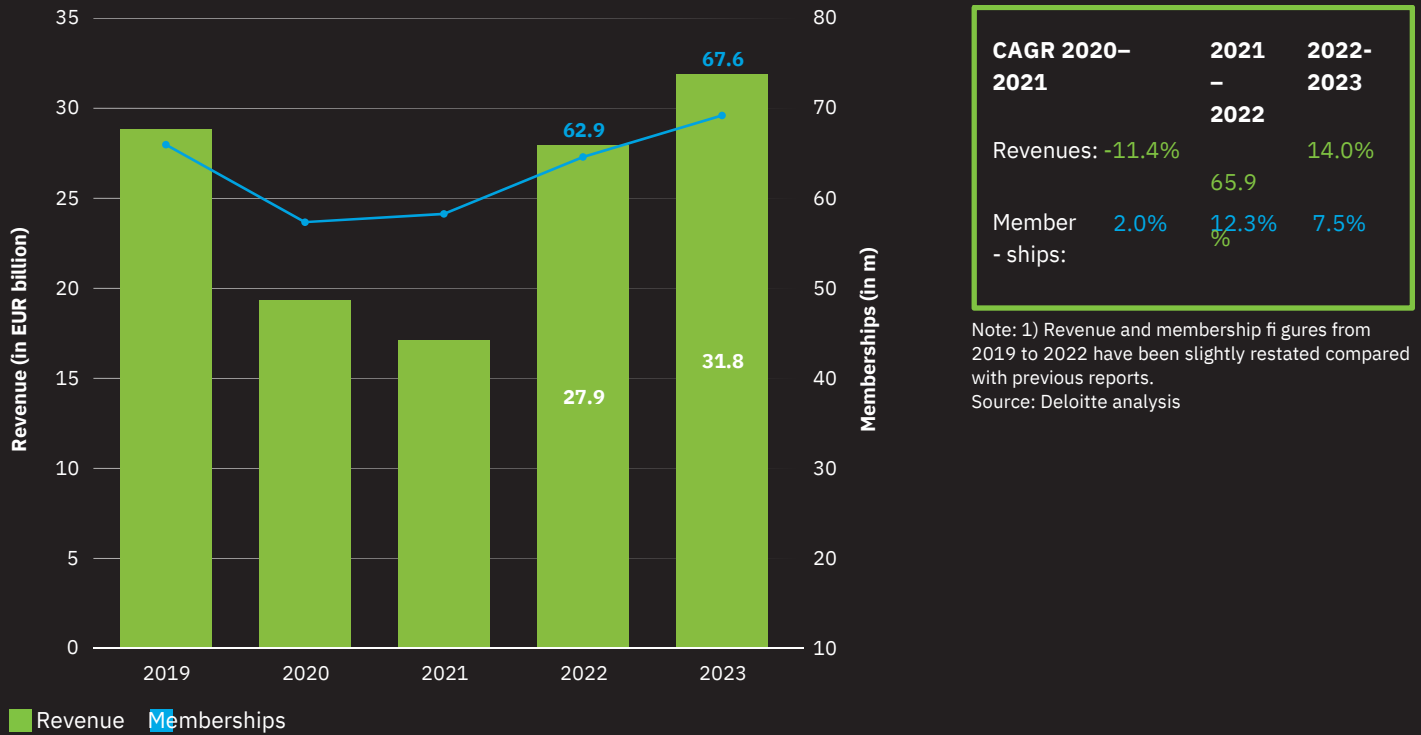


Total
revenues

€31.8 billion

Note: 1) Relative changes compared with previous year calculated on adjusted 2022 KPIs due to restatements Source: Deloitte analysis

Fig. 1 – Development of revenues and memberships since 2019



European fitness market - 5 year penetration rates

Penetration rates	2019	2020	2021	202	2023
Overall	8.1%	6.9%	7.0%	2	8.4%
15+	9.8%	8.2%	8.4%	7.9	10.1
				%	%

Fig. 2 – Revenue development in selected markets

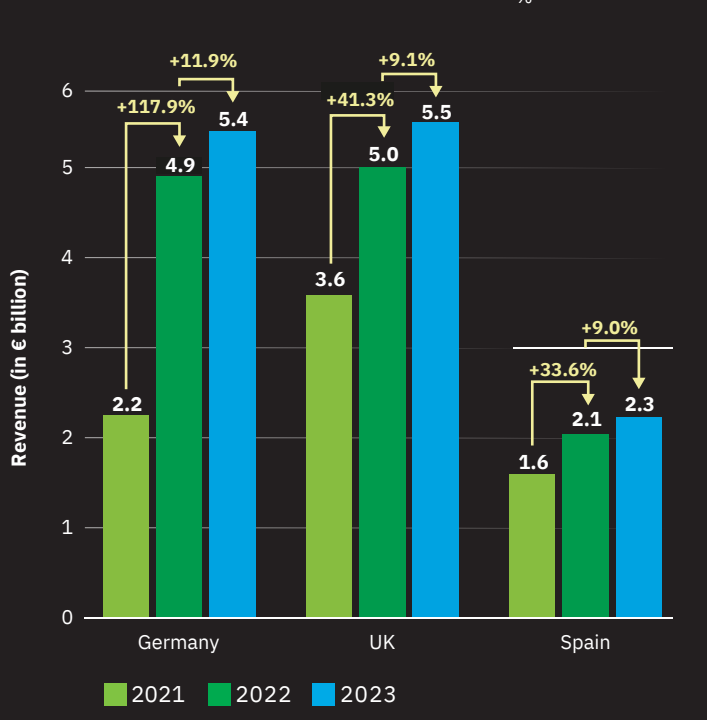
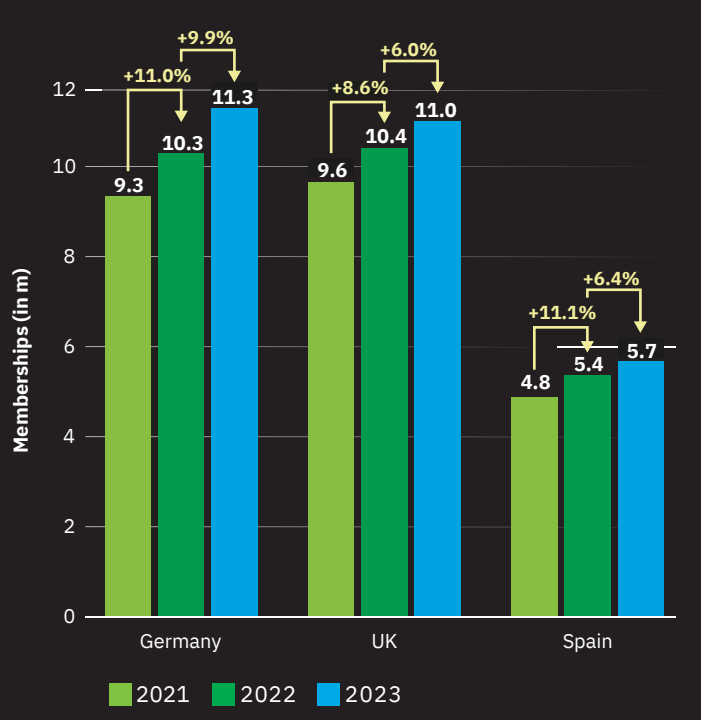


Fig. 3 – Membership development in selected markets



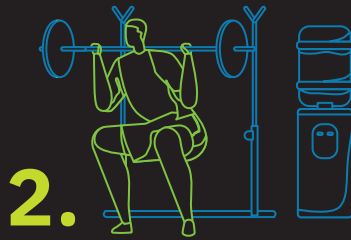


Key Takeaways of the EuropeActive Consumer Survey¹



1.

After the share of regular fitness practitioners in the overall population increased from 2022 (54%) to 2023 (60%), this share has remained stable in 2024 (61%).



2.

The three key fitness settings remain complementary environments. However, the proportion of multi-setting users has slightly decreased, driven by a distinct shift away from home fitness in favour of club-based exercise.



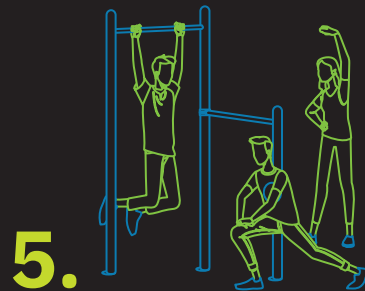
3.

From the consumer's point of view, the most important factor in choosing their fitness club is the price as well as the value they get for the invested money. This is followed by location, quality of service and features and opening hours, whereas social factors play a less prominent role in the club selection process.



4.

Regular fitness practitioners represent a highly interesting target group from a business perspective, as they display openness for attractive products and services and also have an above-average time and financial budget.



5.

Regular home and outdoor practitioners who do not use a fitness club mainly cite the presence of other fitness practitioners, club opening hours and a general preference for the home or outdoor environment as reasons for not including club-based exercise into their fitness routines.



6.

Regarding people who generally do not follow a regular fitness routine (or none at all), it is primarily intrinsic reasons, such as general motivational problems or time constraints, impeding more frequent exercise. Therefore, converting this group into regular fitness practitioners appears to be a complex challenge while at the same time implying sizable target group potential.