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European Health & Fitness Market
Report 2026

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

The European fitness market at a glance

On behalf of EuropeActive and Deloitte, we welcome you to the thirteenth edition of the European Health & Fitness Market Report (EHFMR) covering the calendar year 2025. This report represents the fifthteenth 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.

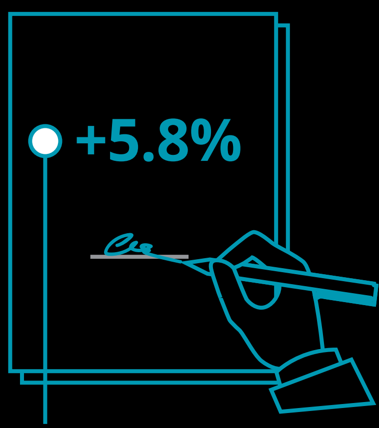
We trust you will find reading this report valuable.
Sincerely,

Herman Rutgers
EuropeActive
Ambassador

Karsten Hollasch
Deloitte
Partner

Number of fitness club members

75.5 million



Membership change[1]

Note: 1) Relative changes compared to previous year calculated on adjusted 2024 KPIs due to restatements
Source: Deloitte analysis

Clubs
67,515

20.9 million
Members of top 20 operators

Club change[1]
+2.8%

Share members of top-20 operators of total market
+28%

M&A deals
27

9.3% (total)
11.0% (aged 15+)
Penetration rate

Revenue change[1]
+9.1%

Total revenues
€39.1 billion

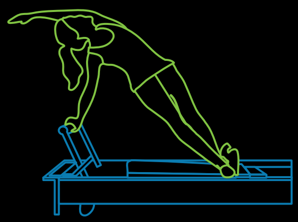
Note: 1) Relative changes compared to previous year calculated on adjusted 2024 KPIs due to restatements
Source: Deloitte analysis

Key takeaways

1.

Across the overall population, the share of regular fitness practitioners maintained its continued growth over the previous years reaching 64% and thus standing five percentage points above the 2023 level.

2.



Fitness clubs constitute the most relevant setting among fitness facilities across markets. Specialized studios and formats such as HIIT, CrossFit or Pilates attract smaller, clearly defined user groups — with their popularity differing noticeably from country to country.

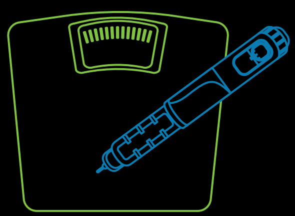
3.

Generational differences are reflected in diverging fitness behaviors and preferences. While younger generations show a higher engagement in digital fitness solutions and specialized studio formats, older cohorts remain largely represented in traditional formats. Health awareness is high across all generations, yet younger users tend to view fitness more strongly as part of their lifestyle and self-identity.

4.

Although healthy nutrition is widely recognized as important, consumers with a regular fitness routine demonstrate a much higher level of consistency in translating this awareness into daily nutritional habits. A comparable pattern emerges in supplement use, where regular fitness practitioners show a comparable higher uptake of both general-health products and training-related supplements.

5.

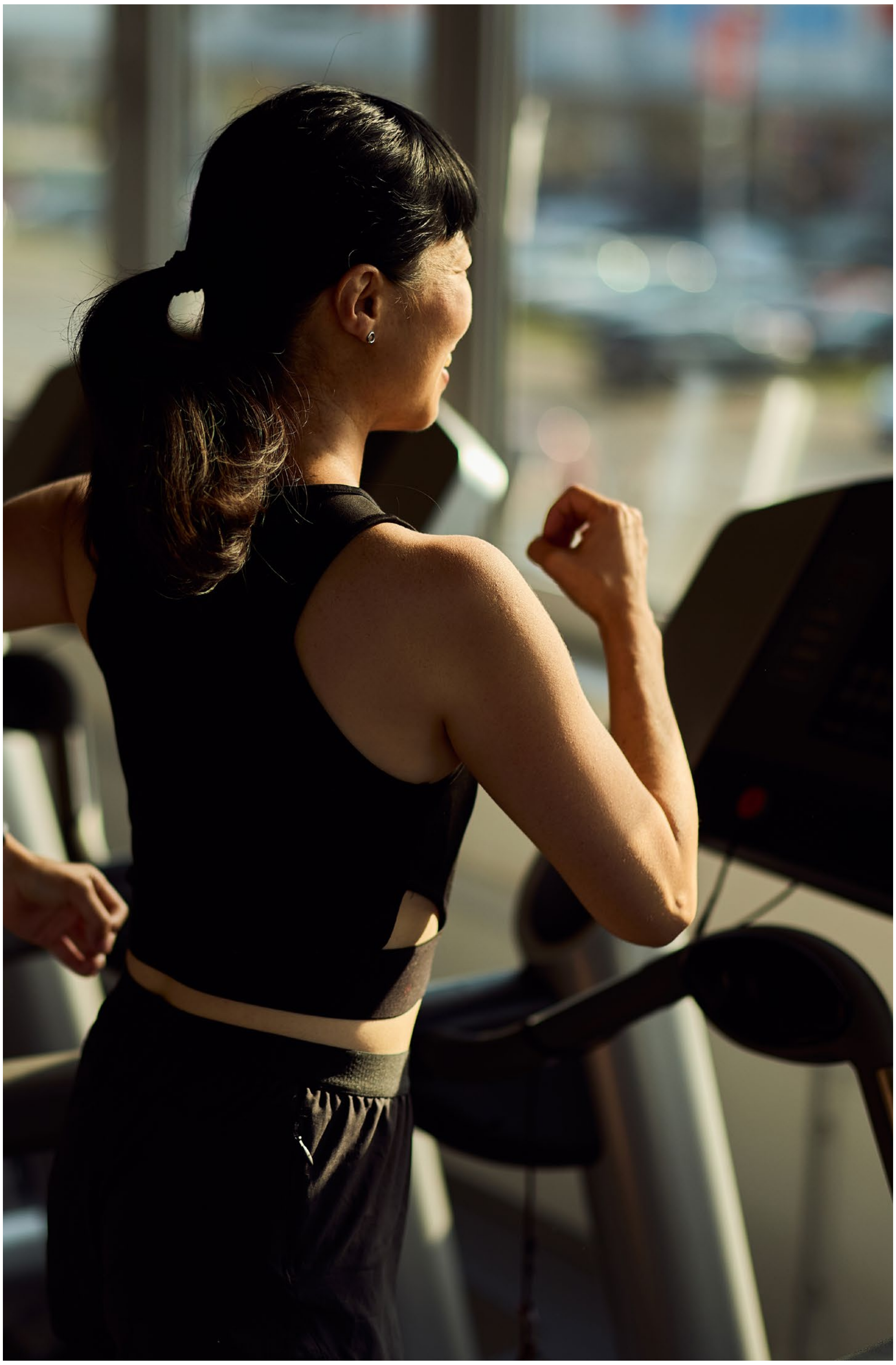


Familiarity with weight-loss injections, including GLP-1 medication, is widespread; however, actual usage remains limited to a very small share of the population (<3% of the overall sample). Among current users, around two-thirds engage in regular fitness training, indicating that the majority follows the recommendation to combine treatment with exercise—with roughly half of them training in fitness clubs. Discontinuation of use is influenced by a mix of personal priorities, safety considerations and perceptions of limited effectiveness.

6.

Even though it is not new, the concept of longevity is recognized by many respondents, though primarily at a superficial level. When reflecting on which factors contribute most to maximizing long-term health, people prioritize fundamental behaviors such as regular physical activity, sleep quality and a balanced diet, while social, cognitive and preventive aspects are seen as secondary contributors.

M&A and investment activities



In 2025, a total of 27 transactions were recorded in the area of brick-and-mortar club operators in the course of which 936 clubs were transferred. The acquisition of clever fit by Basic-Fit represents by far the largest transaction, accounting for 493 clubs and thus more than 50% of all clubs transferred. The acquired businesses are geographically distributed across ten countries (AT, DE, ES, FR, NO, PL, PT, SE, TR, 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. 1 – Selected mergers and acquisitions in 2025

Date	Company	# of Clubs	Country	Seller	Acquirer
Jan	Body Factory	5	Spain	Body Factory	VivaGym
	Roko health clubs	4	United Kingdom	Roko health clubs	Everlast Gyms
Feb	Wellness Sport Club	14	France	Pechel Industries	Waterland Private Equity Investments BV
	Sport-Park	4	Germany	Sport-Park	Tradineo
Apr	CityFit	26	Poland	CityFit	Medicover AB
	FIT/ONE	45	Germany, Austria	FIT/ONE	LifeFit Group
May	MAC Group	121	Turkey	Odyssey Sarl, Vector Capital Sarl	Benefit Systems SA
Jun	Actic Group AB	12	Norway	Actic Group AB	Mova AS
	clever fit	8	Germany	clever fit	VK BodyFit
	ProGym	5	Norway	ProGym	Sporty Holding Group AS
	Wifit Gyms SL	7	Spain	Wifit Gyms SL	Alter Capital Desarrollo Sgecr SA
Jul	Quo Fitness	4	Spain	Quo Fitness	VivaGym
	Fit Star	20	Germany	Fit Star	all inclusive Fitness
	Episod Sports Studios	7	France	Episod Sports Studios	Ciclad
Aug	Les Cercles de la Forme SARL	26	France	Montefiore Investment SAS	WellNest Society
Sep	Endorfin AB	4	Sweden	Endorfin AB	Nordic Wellness
	Gymnasium Group	5	Portugal	Gymnasium Group	VivaGym
	Pump Gyms Ltd	5	United Kingdom	Pump Gyms Ltd	NRG Gyms
	Fitness Future	11	Germany	Fitness Future	all inclusive Fitness
	MC Shape	37	Germany	MC Shape	Rhein Invest
Nov	clever fit	493	Germany	clever fit	Basic-Fit
	EASYFITNESS	12	Germany	EASYFITNESS	Kraftwerk Deutschland GmbH
	Interval	10	France	Interval	Anytime Fitness (Purpose Brands)
Dec	Endorfina Group	11	Poland	Endorfina Group	Benefit Systems SA
	Forma Sport	13	Spain	Forma Sport	VivaGym
	Inacua	10	Spain	Serveo Group	Forus
	clever fit	17	Germany	clever fit	Basic-Fit

Top-3 transactions by number of clubs

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

Website
www.dssv.de

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

Population
83.6 m

Germany

Revenue[1] (in EUR m)	Members[1] (in k)	Clubs[1]	VAT rate on fitness	Penetration rate
6,250	12,360	9,647	19% regular	14.8%
(+7.4%)	(+5.6%)	(+5.7%)		(13.8%)

Recent market events
selected/illustrative

- **2020** – Merger of Ai Fitness and jumpers to form BestFit Group, (now all inclusive Fitness) operating 64 clubs[2]
- **2020/21** – COVID-19-induced lockdown of ca. 40%[3]
- **2021** – Waterland PE acquired 50% stake of FIT/ONE (30 clubs[2] in DE & AT)
- **2022** – Lafayette Mittelstand Capital acquired ACISO (172 clubs in DE & AT, incl. franchises[2])
- **2022** – LifeFit Group acquired In Shape (13 clubs[1]) and FitnessLOFT (27 clubs[2])
- **2023** – INJOY acquired 22 clubs[2] of Actic Group (in DE & AT)
- **2023** – all inclusive Fitness acquired FiveStar (11 clubs[2]) with ca. 50,000 members
- **2023** – all inclusive Fitness acquired FLEXX Fitness (nine clubs[2]) in Cologne and the surrounding area
- **2024** – Waterland PE acquired LifeFit Group (140 clubs[2])
- **2025** – LifeFit Group acquired FIT/ONE (33 clubs in DE[2])
- **2025** – Basic-Fit acquired clever fit (406 clubs in DE, incl. franchises[2])
- **2025** – all inclusive Fitness acquired Fit Star (20 clubs in DE[2])

Fig. 53 – Largest operators by number of clubs

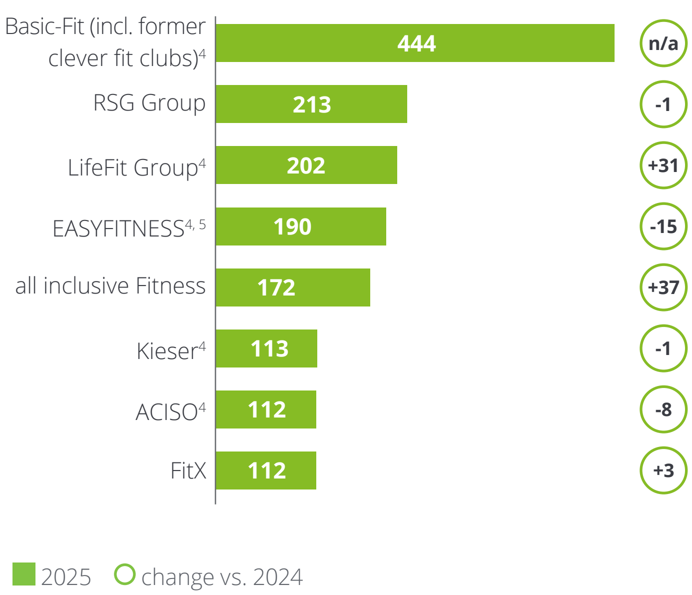


Fig. 54 – Further selected fitness market participants

Company/brand	Segment	Further information
Bodystreet[4]	Special-interest	236 clubs (-4)
Mrs.Sporty[4]	Special-interest	75 clubs (-18)
Urban Sports Club (part of Wellhub)	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) Percentage rates reflect estimated market growth and increases resulting from revised methodology in 2025 (see page 8); 2) At the time of the transaction; 3) 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; 4) Fully or partly a franchise operation; 5) Including EMS clubs
Sources: Public information, market experts, unaudited company information, Eurostat, Deloitte analysis

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BASIC-FIT

FIBO GLOBAL FITNESS

gym80

MATRIX

PURPOSE BRANDS

TECHNOGYM