

**Deloitte.**

**europe active**  
MORE PEOPLE | MORE ACTIVE | MORE OFTEN



European  
Health & Fitness Market  
Report 2023



Preface	5
Introduction	6
The European Fitness Market at a Glance	8
The Ecosystem of the European Fitness Sector	12
EuropeActive Consumer Survey	35
Major European fitness operators	61
Profiles of selected European fitness operators	69
Short Profiles	102
Mergers & Acquisitions	106
The View from Brussels	114
Overview of selected European markets	118
Selected European country profiles	123
About EuropeActive	169
EuropeActive Event Calendar	170
About Deloitte Sports Business Group	171
Methodology	172
Glossary	174
Your Contacts	178

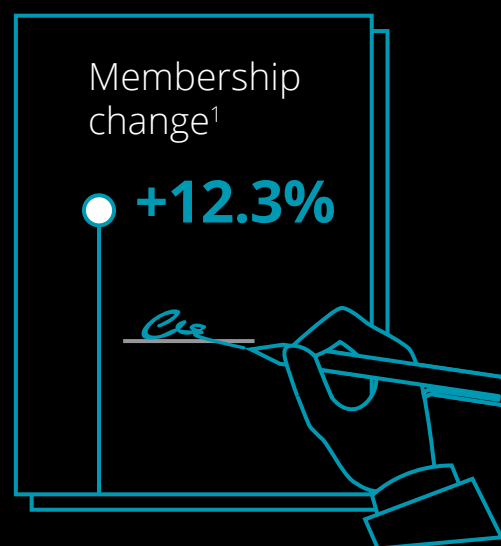
# The European Fitness Market at a Glance

Number of fitness club members



Membership change<sup>1</sup>

+12.3%

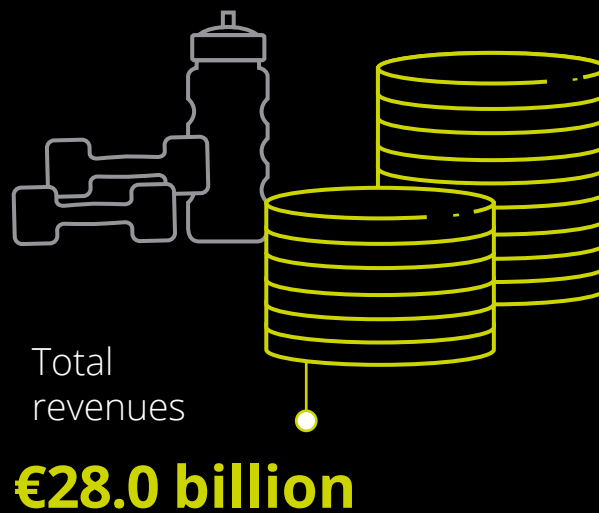
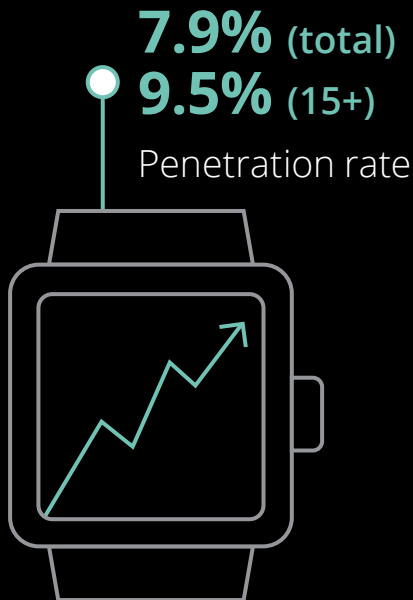
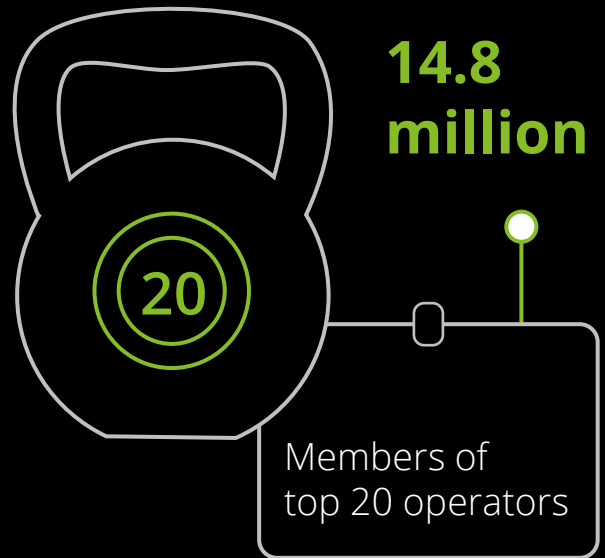
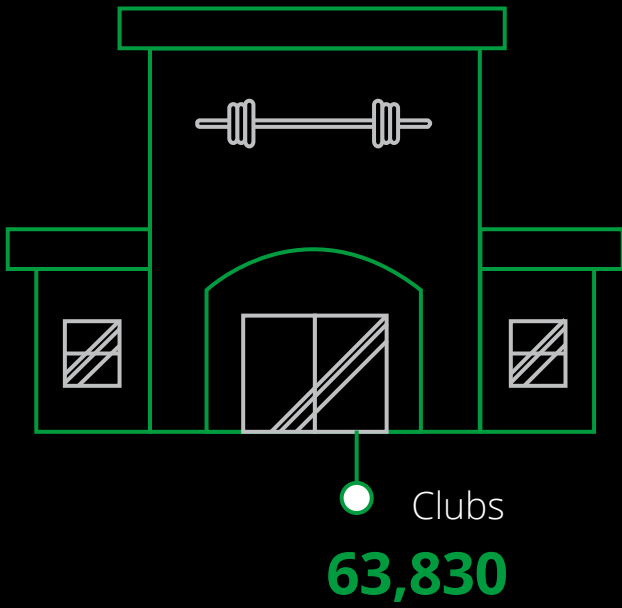


Club change<sup>1</sup>

+0.5%

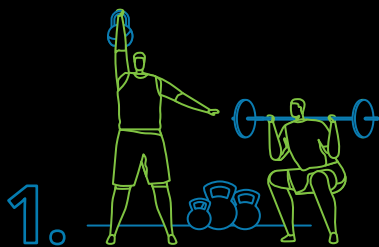


Note: 1) Relative changes compared to previous year calculated on adjusted 2021 KPIs due to restatements.  
Source: Deloitte analysis.

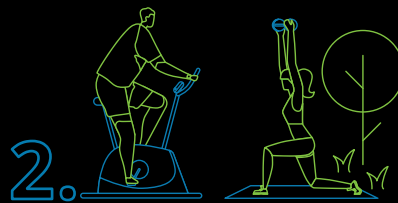




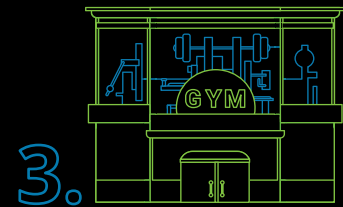
**Despite country-specific differences, a number of overarching developments with respect to fitness frequency, fitness settings as well as the usage of digital tools have been identified, according to the Europe-Active Consumer Survey<sup>1</sup>**



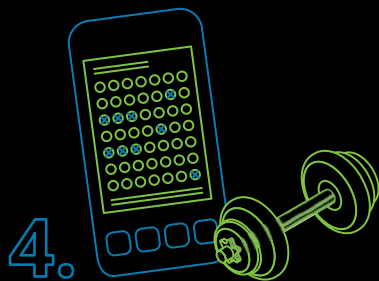
**1. Increase in the number of regularly active fitness practitioners**



**2. Home, outdoor, and club-based fitness continue to be used complementarily**



**3. Fitness club usage shows the most positive development among fitness settings**



**4. Fitness club users commonly utilize digital workout planning tools to organize their fitness club visits**



**5. Driven by non-paid offerings, the usage of digital tools in home fitness has increased**



**6. Compared to other expenditure categories, fitness club activities are less impacted by inflation-related budget cuts**

Note: 1) Based on 10,923 respondents across 19 European countries in January 2023.  
Sources: EuropeActive Consumer Survey 2023.

**Fig. 44 – Selected mergers and acquisitions in 2022**

	Date	Company	# of clubs	Country	Seller	Acquirer
1	Jan 22	ACISO <sup>1</sup>	172	AT/DE	Migros	Lafayette Mittelstand Capital
2	Jan 22	Premium Fitness & Gym	12	PL	Private Investor(s)	Medicover
3	Apr 22	In Shape	13	DE	Private Investor(s)	LifeFit Group
4	May 22	Bare Trening Sør	7	NO	Private Investor(s)	SATS Group
5	May 22	McFit Poland	14	PL	RSG Grup	Medicover
6	Jun 22	Aktiv365 <sup>1</sup>	9	NO	Private Investor(s)	Norsk Treningshelse (Family Sports Club)
7	Jun 22	Neoness	32	FR	Private Investor(s)	Keep Cool
8	Jul 22	Holmes Place Spain	5	ES	Holmes Place Spain	RSG Group
9	Jul 22	World Class Romania	41	RO	Resource Partners	African Industries Group
10	Aug 22	Multiple operators <sup>1</sup>	64	NO	Private Investor(s)	Credo Partners
11	Dec 22	Oxygen Fitness	6	BE	Private Investor(s)	Jims Fitness
12	Dec 22	FitnessLOFT <sup>1</sup>	27	DE	Private Investor(s)	LifeFit Group
13	Dec 22	Platinum Fitness & Smart Gym <sup>1</sup>	18	PL	Private Investor(s)	Medicover

Note: 1) Including franchises.

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



# Germany



Revenue (in EUR m)

4,900

(2,200)



Members (in k)

10,300

(9,300)



Clubs

9,149

(9,492)



VAT rate on fitness

19% regular



Penetration rate

12.4%

(11.1%)

## Market description

The German market consists primarily of individually operated facilities; nevertheless, a trend of market consolidation towards chain operators could be observed over the last years as the share of clubs operated by fitness chains grew. Furthermore, many facilities in the chain as well as in the micro segment are affiliated with a franchise or licensing system. Average membership fees have increased for the second consecutive year which can be partially explained by price increases of several German club operators.

At the beginning of 2022, fitness clubs in Germany were still obliged to COVID-19 related health and safety measures (e.g. "3G rule"). Since then, the German market has recovered in terms of revenue as well as memberships, and reached about 90% of pre-COVID levels for both KPIs. At the same time, the number of clubs has constantly decreased since the beginning of the pandemic from 9,669 (2019) to 9,149 (2022).

## Consumer Survey Results<sup>3,4</sup>

In EuropeActive's European Health and Fitness Consumer Survey conducted in January 2023, the level of consumers practicing fitness (i.e., at a fitness club, at home, or outdoors), with at least some regularity, remains with 84% at the previous year's level. With regard to the people who do fitness at least once a week, the proportion rose to 64% from 57% in the previous year.

Besides, the survey results indicate different developments for fitness locations used by regular fitness practitioners. The share of those individuals doing home fitness decreased by -8pp (total 65%), while the proportion of those practicing outdoors (total 52%) and those practicing in a fitness club (total 42%) increased slightly.

## Association

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

## Website

[www.dssv.de](http://www.dssv.de)



## Recent market events

selected/illustrative

Merger of Ai Fitness and jumpers to form BestFit Group (64 clubs<sup>1</sup>)

COVID-19-induced lockdown of c. 40%<sup>2</sup>

Waterland PE acquired 50% stake of FIT/ONE (30 clubs<sup>1</sup> in DE & AT)

Lafayette Mittelstand Capital acquired ACISO (172 clubs in DE & AT, incl. franchises<sup>1</sup>)

LifeFit group acquired In Shape (13 clubs<sup>1</sup>) and FitnessLOFT (27 clubs<sup>1</sup>)

First edition of FIBO after COVID-19 related break



2020



2020/21



2021



2022



2022

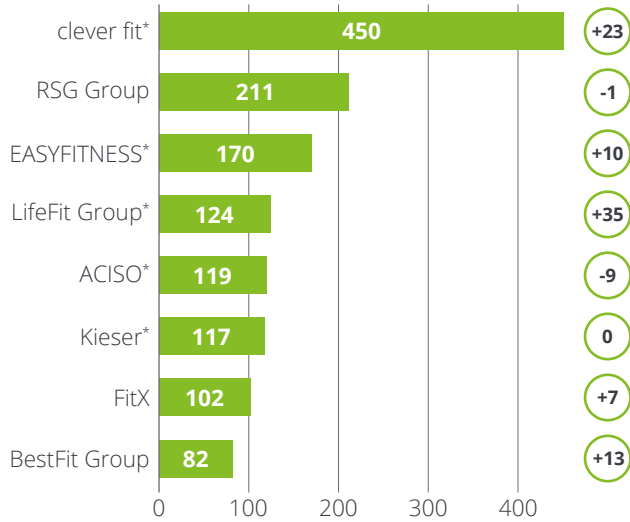


2023

Note: 1) At the time of the transaction; 2) Club closures in significant parts of the country or of the month are considered open 50% of the month; 3) Survey conducted in January 2023 among people at age 16 to 65; 4) Regular fitness practitioners doing fitness at least once a week. Source: EuropeActive Consumer Survey 2022 and 2023.



**Fig. 67 – Largest operators by number of clubs**



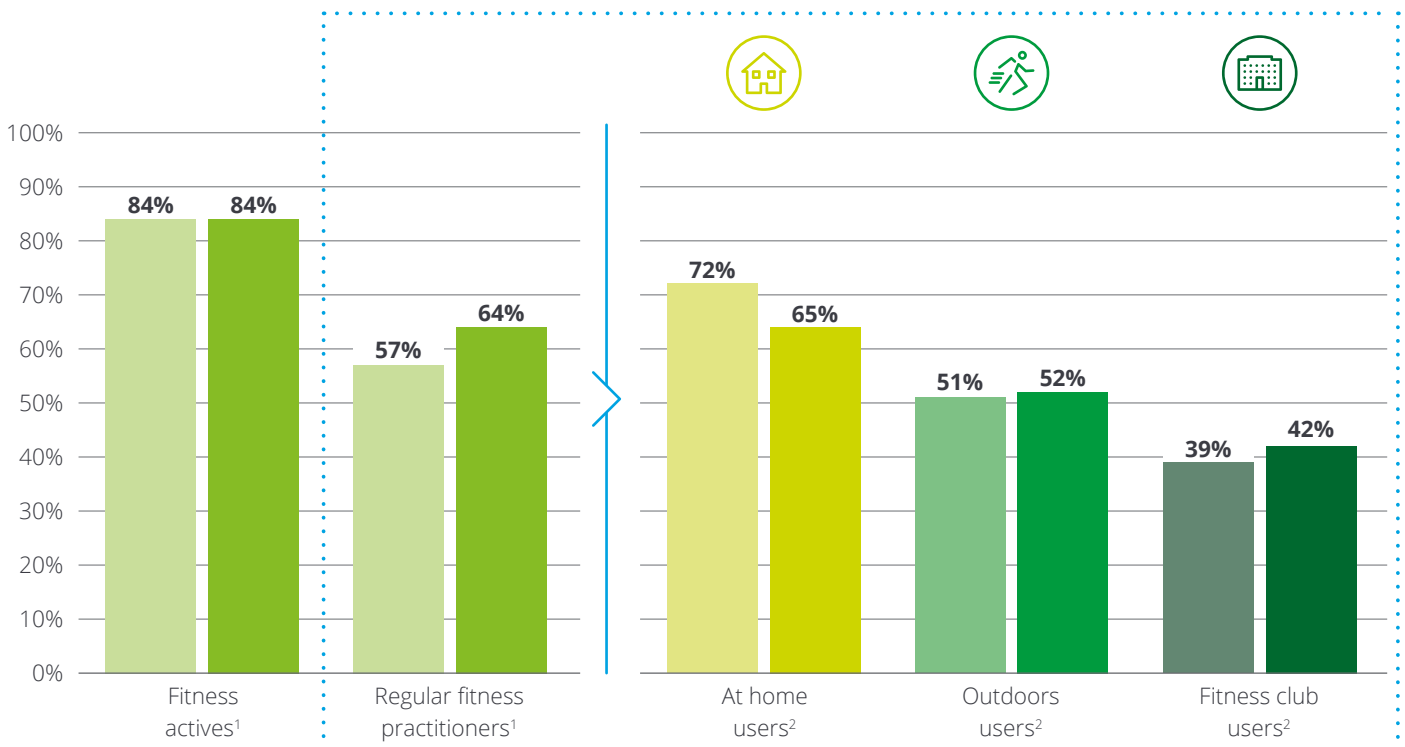
■ 2022 \* Fully or partly a franchise operation.

**Fig. 68 – Further selected fitness market participants**

Company/Brand	Segment	Further information
Bodystreet	Micro	261 clubs (+5)
Mrs.Sporty	Micro	170 clubs (-16)
fit+	Micro	176 clubs (+26)
Urban Sports Club	Intermediary	B2B & B2C
Gympass	Intermediary	B2B only
Exercite (former Hansefit)	Intermediary	B2B only
EGYM Wellpass (former qualitrain)	Intermediary	B2B only

**Fig. 69 – EuropeActive Consumer Survey results for Germany (Jan-2023)**

(Jan-2023: N = 754/Jan-2022: N = 755)



■ Jan22 ■ Jan23

Note: 1) Corresponding survey questions: How often do you currently do fitness (comprising any strength and/or cardio exercises and/or classes you do at a fitness club, at home, outdoors, etc.)? Fitness actives relate to the share of consumers who exercise at least seldomly, Regular fitness practitioners relate to the share of consumers who exercise at least once a week.; 2) Corresponding survey questions: In which settings do you do fitness? The numbers in the chart relate to the share of consumers who exercise at least once a week.

Source: EuropeActive Consumer Survey 2022 and 2023

## **European Health & Fitness Market Report 2023**

Report as of 31 December 2022

Publisher: EuropeActive

Authors: Herman Rutgers, Karsten Hollasch, Stefan Ludwig, Steffen Gaussemann,  
Christian Rump, Jakob Papenbrock, Marc Friedrich, Mandy Brockscothen

Publication date: May 2023

**Price: €399 (for EuropeActive members: €199);**

prices excluding VAT, please order via [www.europeactive.eu](http://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



**Karsten Hollasch**  
Partner  
Head of Consumer Business  
khollasch@deloitte.de



**Herman Rutgers**  
Ambassador  
EuropeActive  
herman@hrutgers.eu



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



**Steffen Gausselmann**  
Manager  
Sports Business Group  
sgausselmann@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](http://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 professionals 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 415,000 people worldwide make an impact that matters at [www.deloitte.com/de](http://www.deloitte.com/de).

This communication contains general information only, and none of Deloitte Consulting GmbH 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.