

Brazil's Fitness Market: What Operators Should Know

The HFA Show 2025: Brazil Forum

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HEALTH & FITNESS
ASSOCIATION



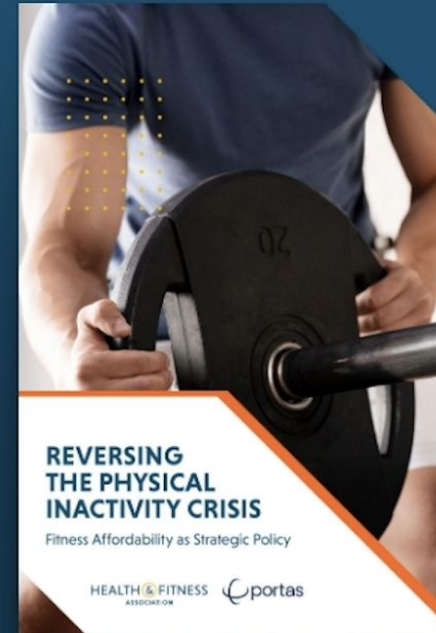
INSIGHTS THAT IMPACT

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CURIOUS HOW YOUR FITNESS FACILITY COMPARES TO THE COMPETITION?

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- ✓ **Enhance your competitive edge** by using benchmarks to refine strategies and stay ahead of market shifts

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Survey Snapshot:

Who We Spoke To

Core sample: Latin Americans aged 18+ in some of the region's largest metropolitan areas who exercise at least a few times per month (n=2,984).

Spread across six key countries:

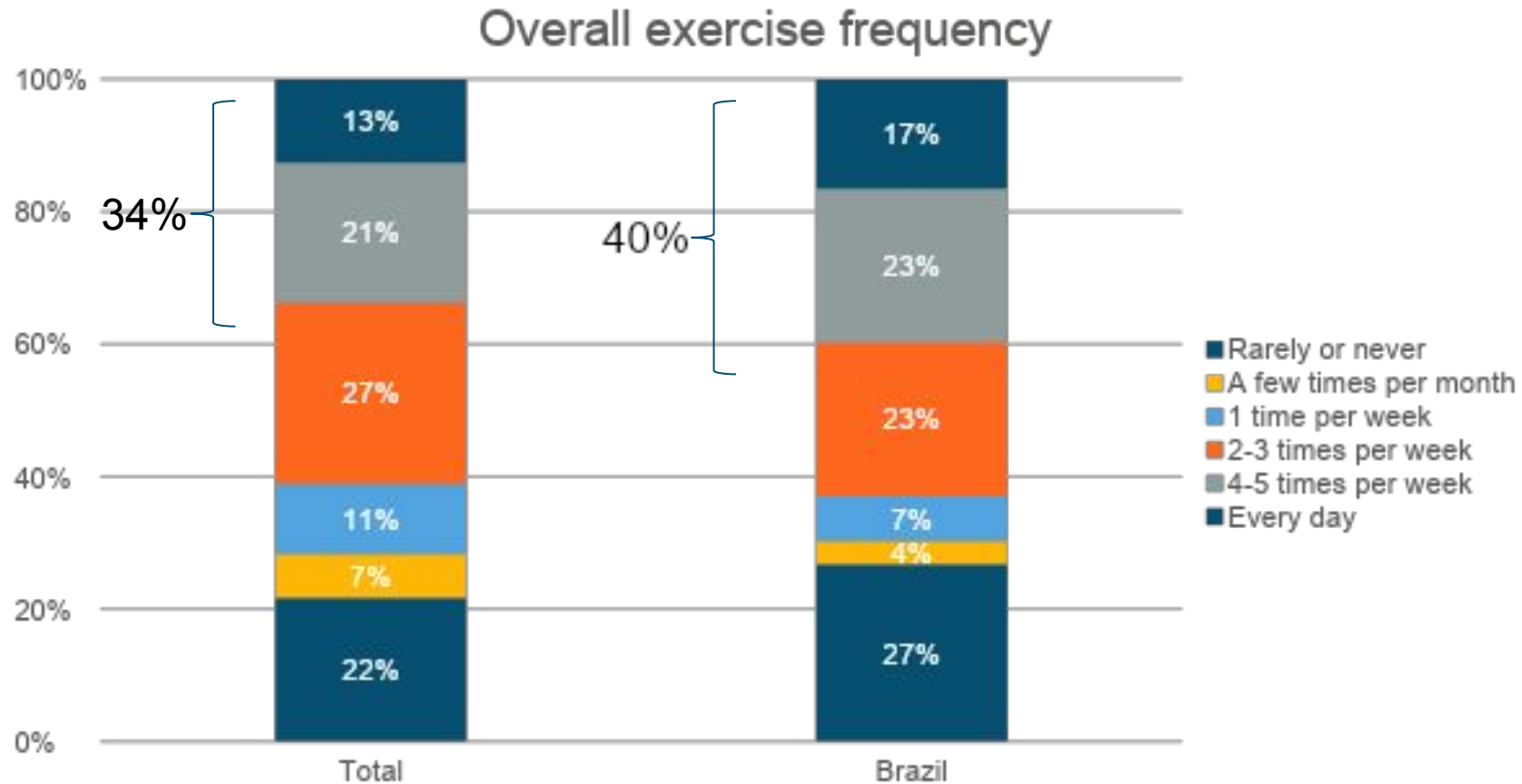
- Metro Brazil (n=814)
- Metro Mexico (n=900)
- Buenos Aires, Argentina (n=300)
- Bogota & Medellin, Colombia (n=500)
- Lima, Peru (n=230)
- Santiago, Chile (n=240)

Dates in Field: September 18 – 24, 2024

Mode: Online

Margin of Error: $\pm 1.8\%$ (95% confidence interval). The MoE is higher for subgroups.

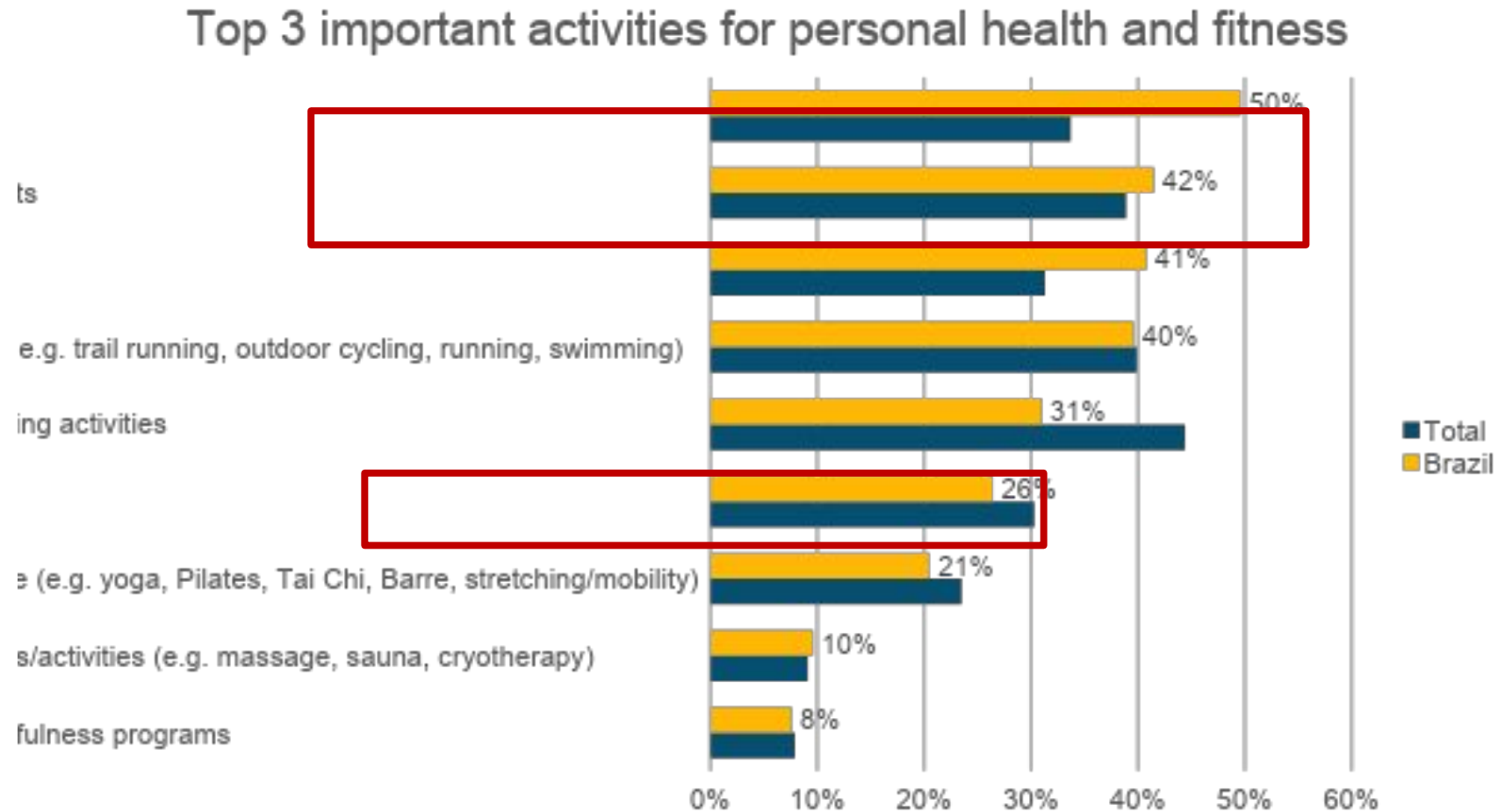
Brazilians Exercise and Often



Top Activities: Outdoor & Strength

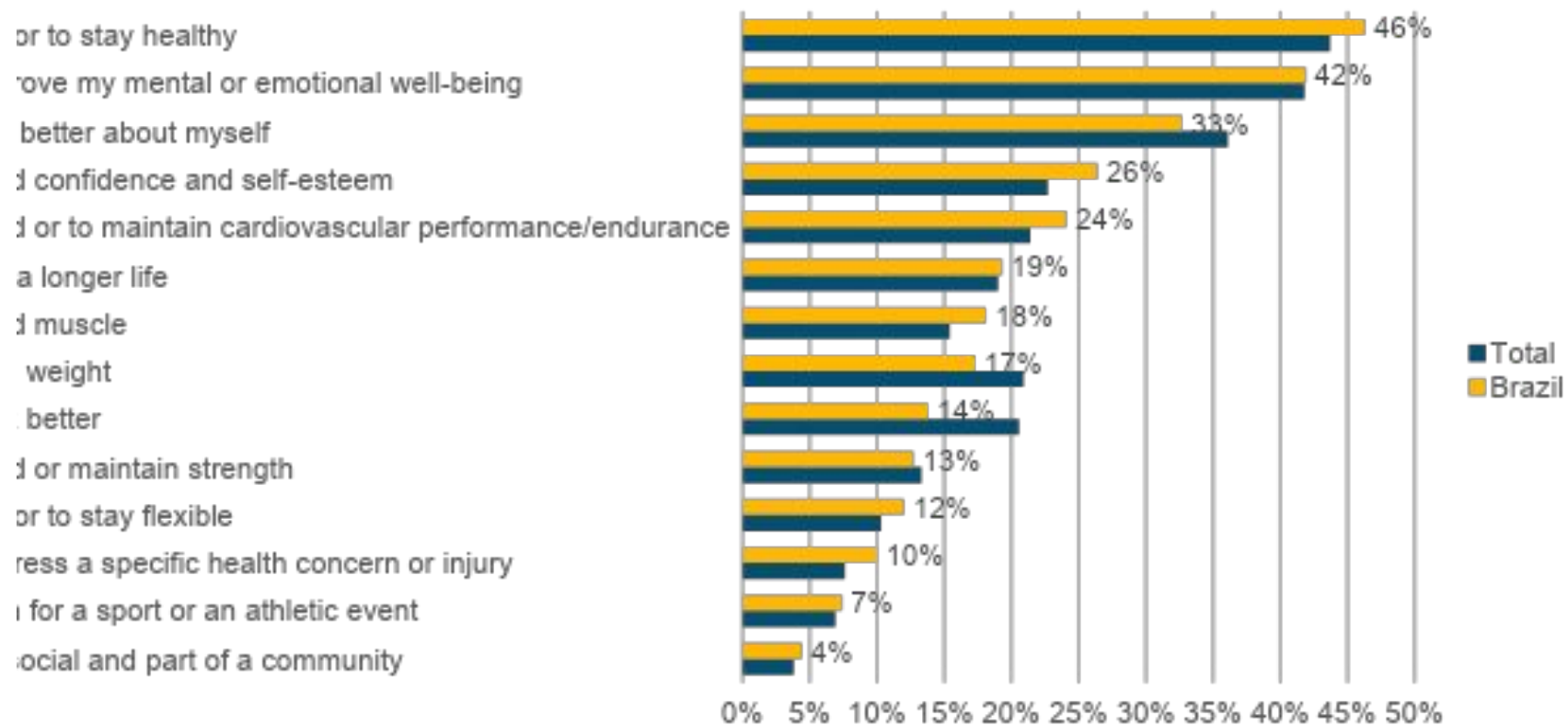


Strength And Sports Are Priorities

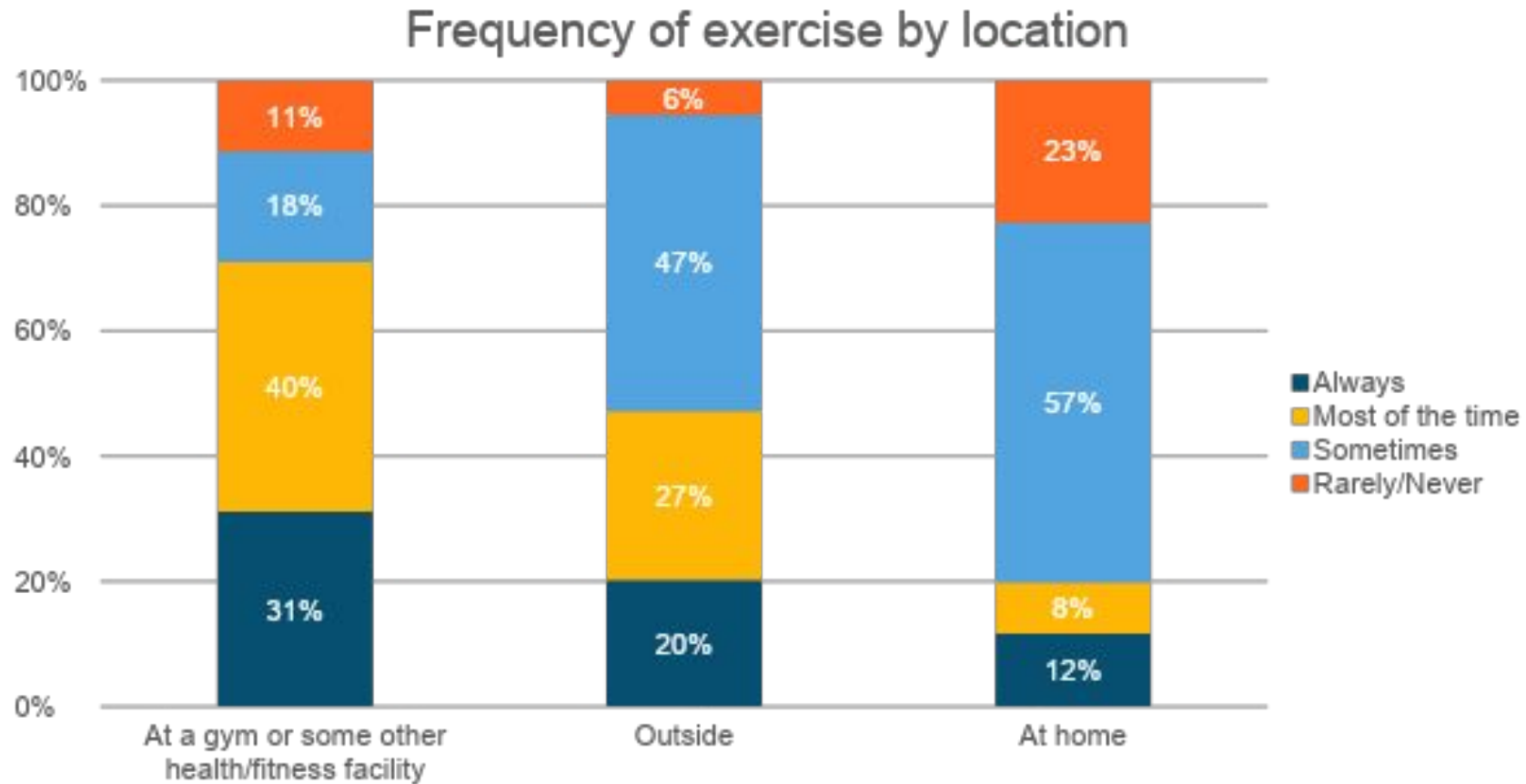


Why They Work Out: Health, Confidence & Well-being

Top 3 personal goals of physical exercise

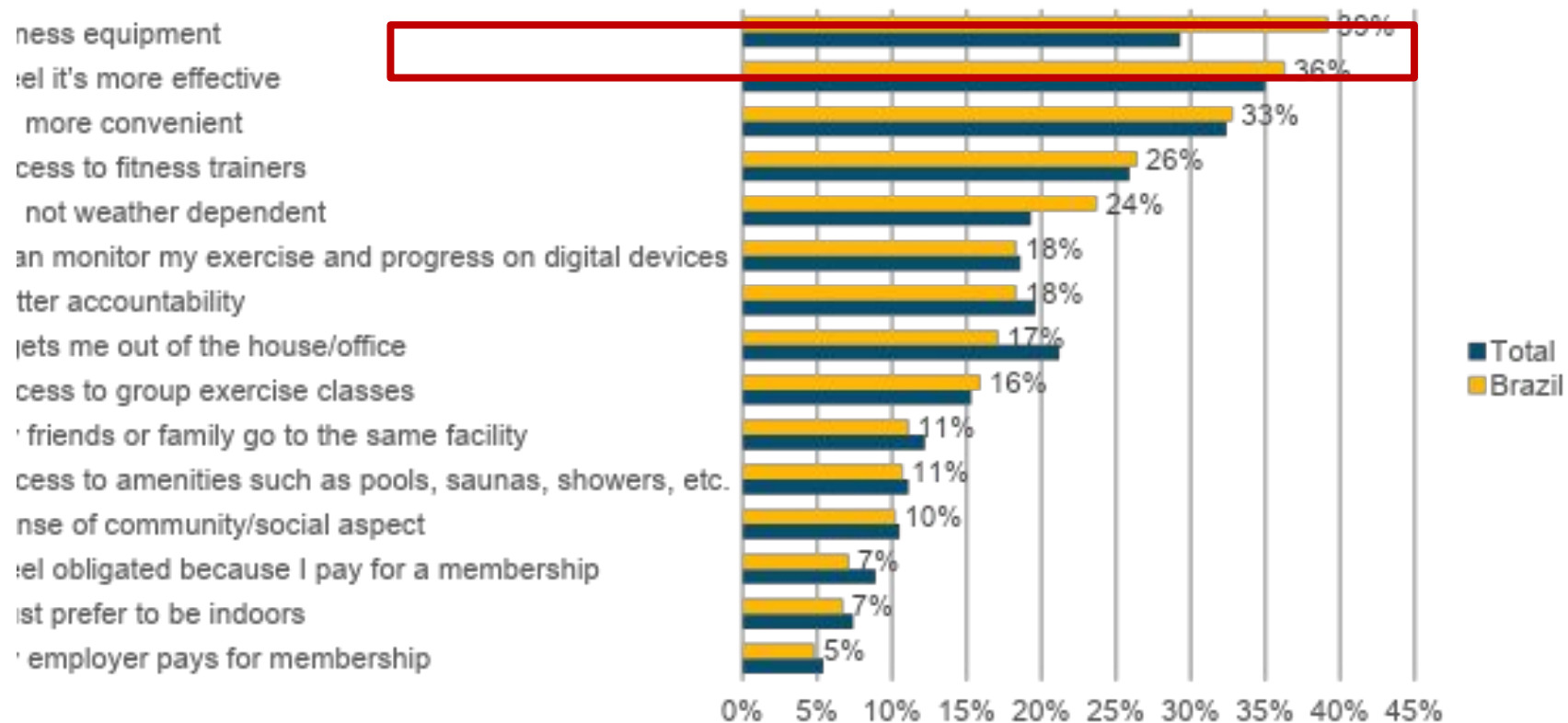


Fitness Facilities: The Go-To Location

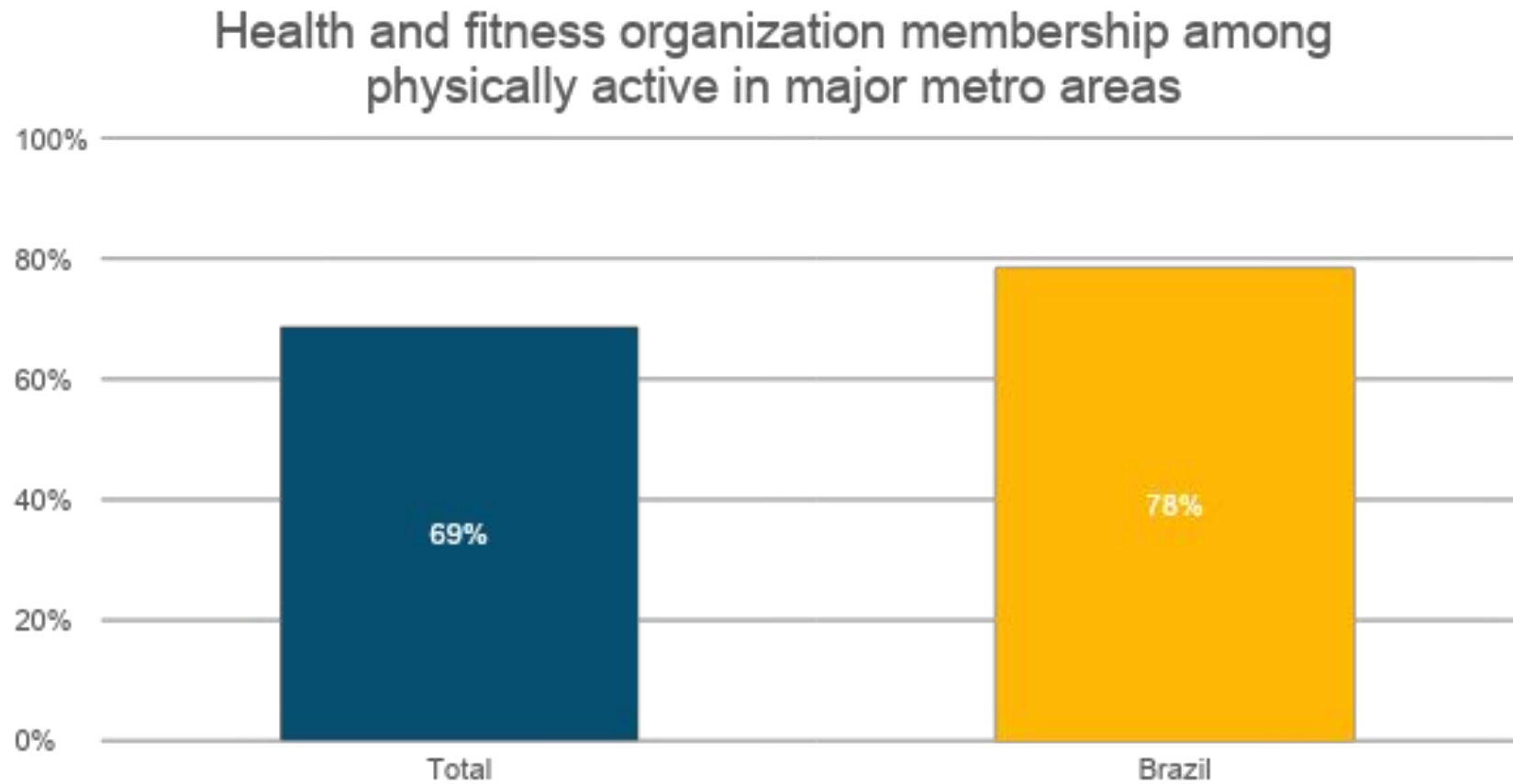


What Gym-Goers Value Most: Equipment & Convenience

Top 3 reasons for primarily exercising at a fitness facility

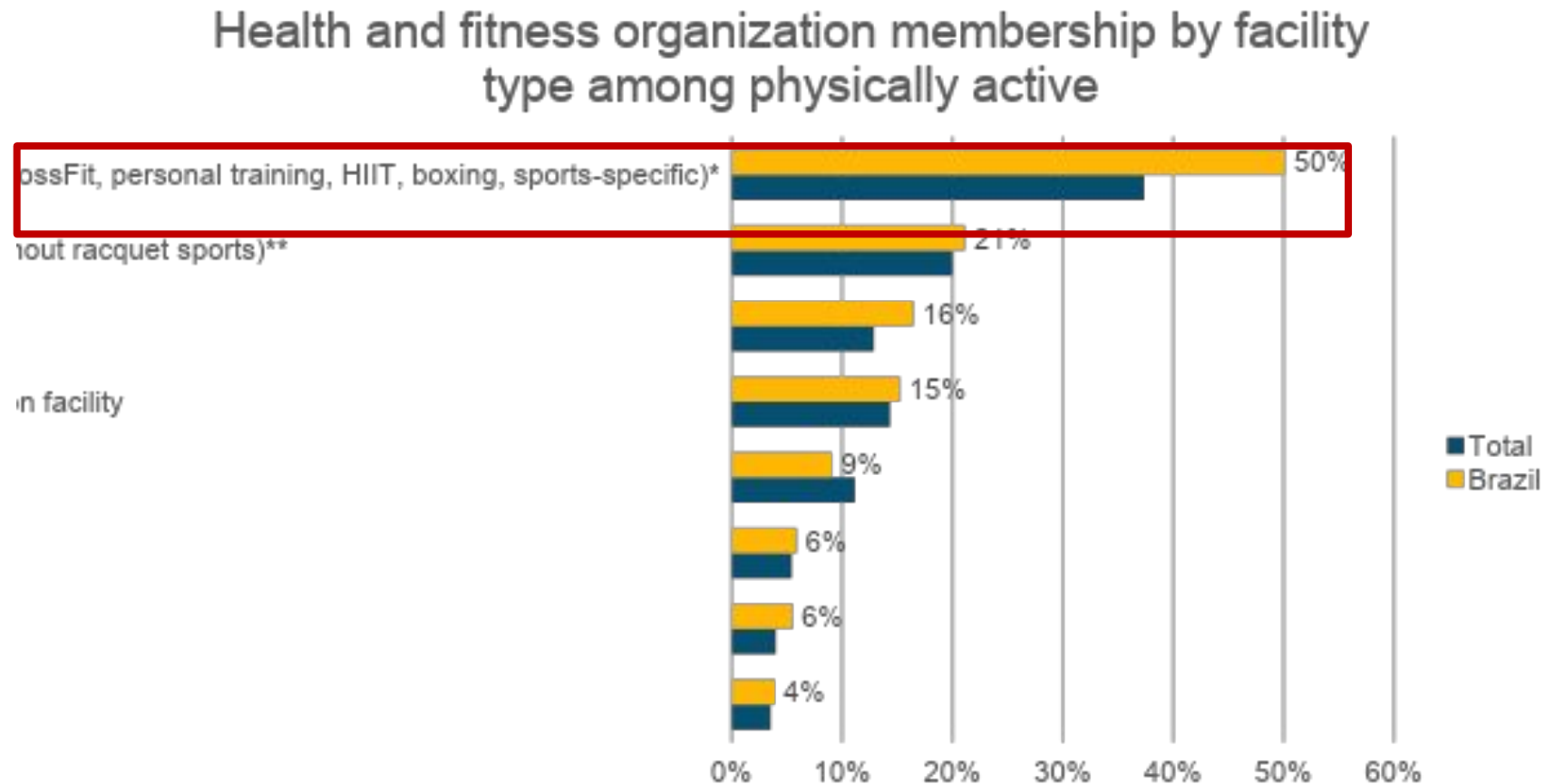


Strong Membership of Health/Fitness Organizations

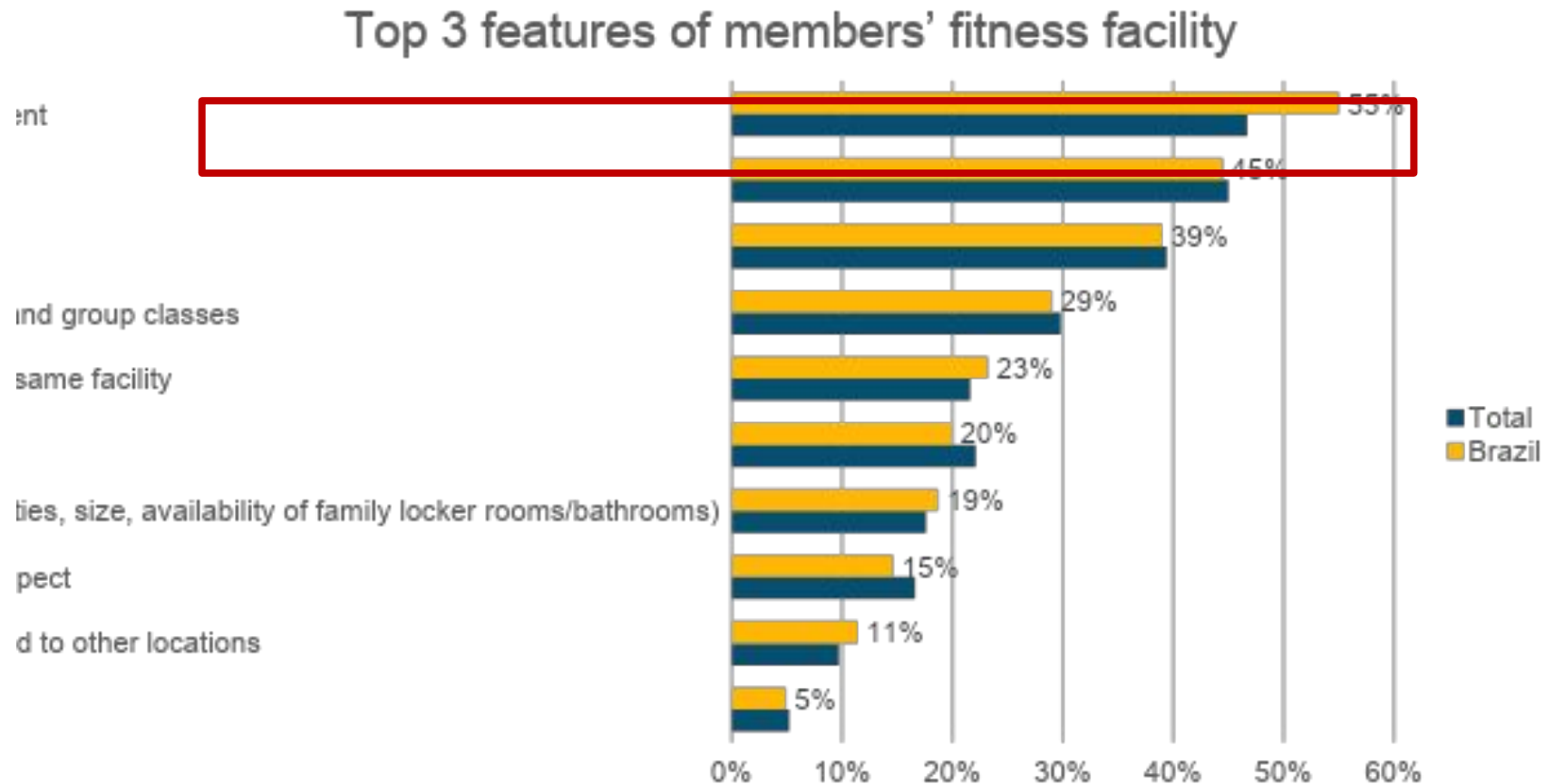


Base: Among physically active consumers in major Latin American metro areas (n=2,984), Metro Brazil (n=814)

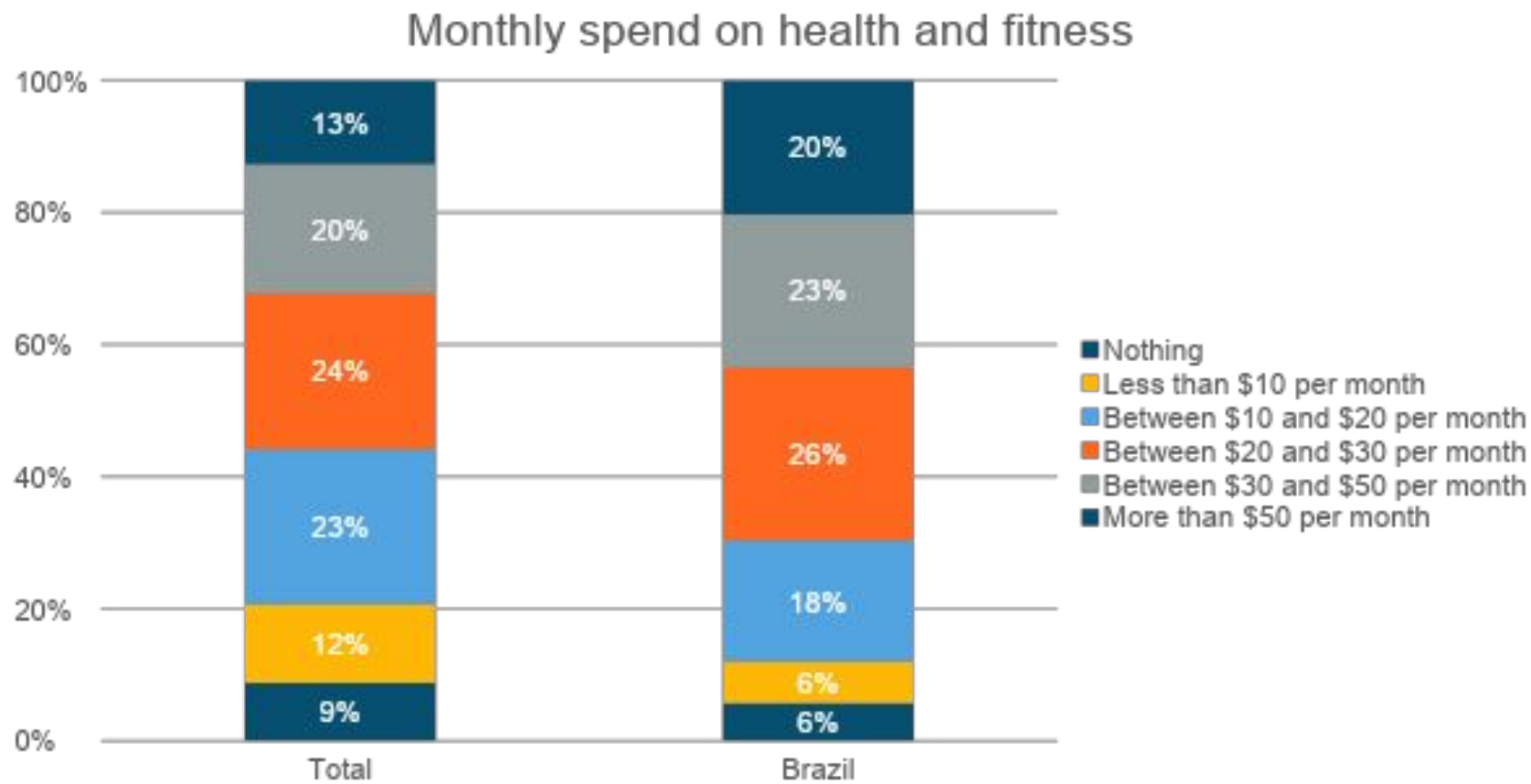
Boutique & Studio Gyms Lead the Way



Location & Equipment Keep Members Coming Back



Brazilians Spend More on Fitness

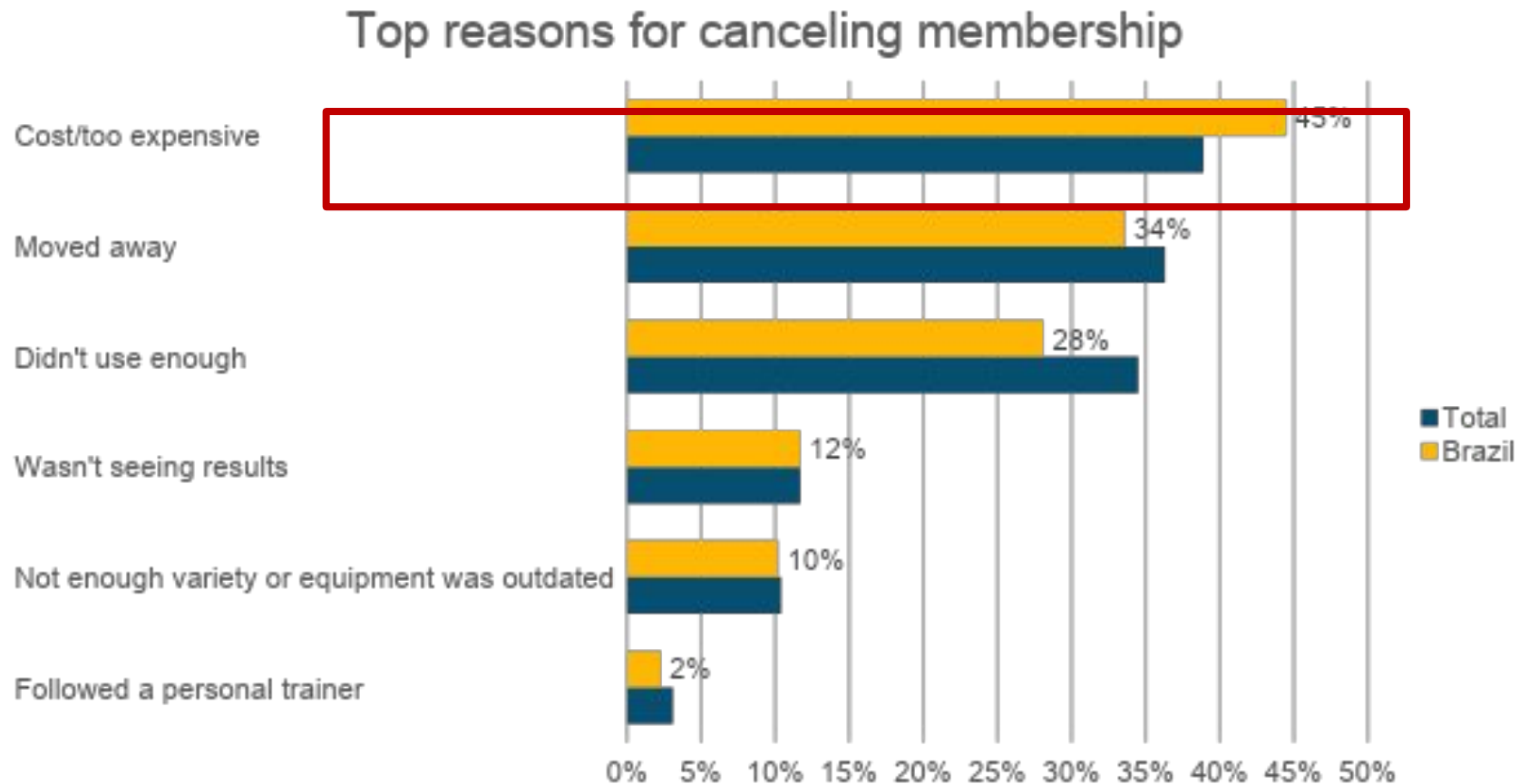


*Respondents were shown response options in local currencies.

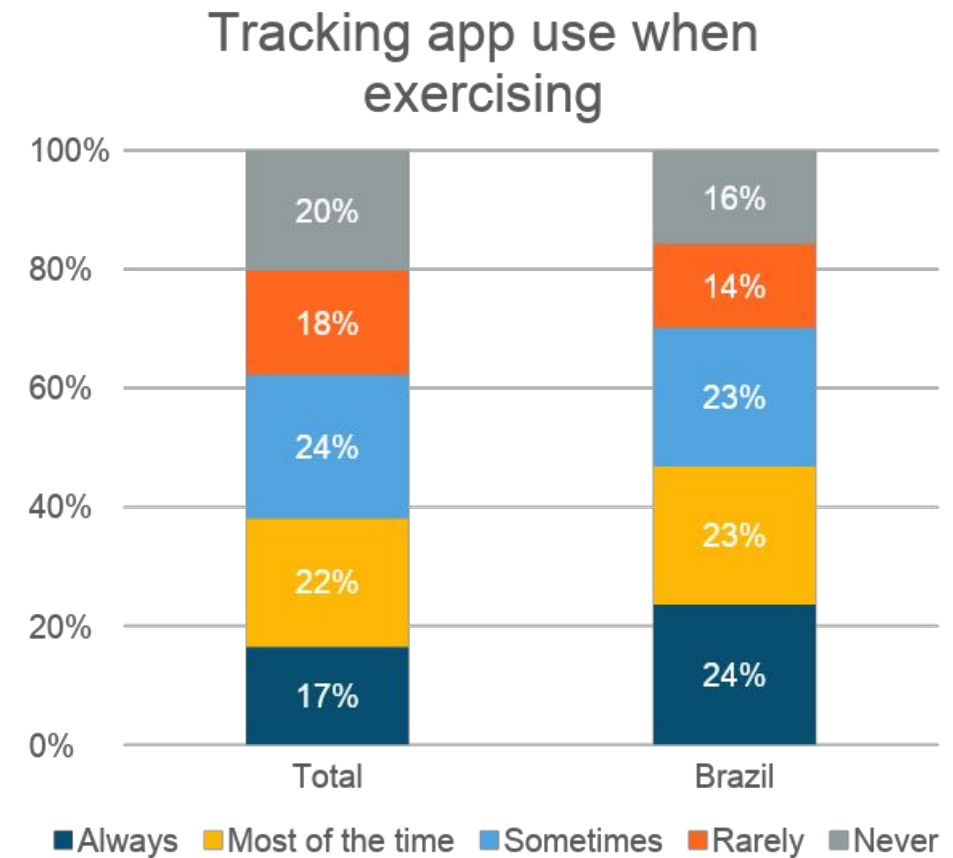
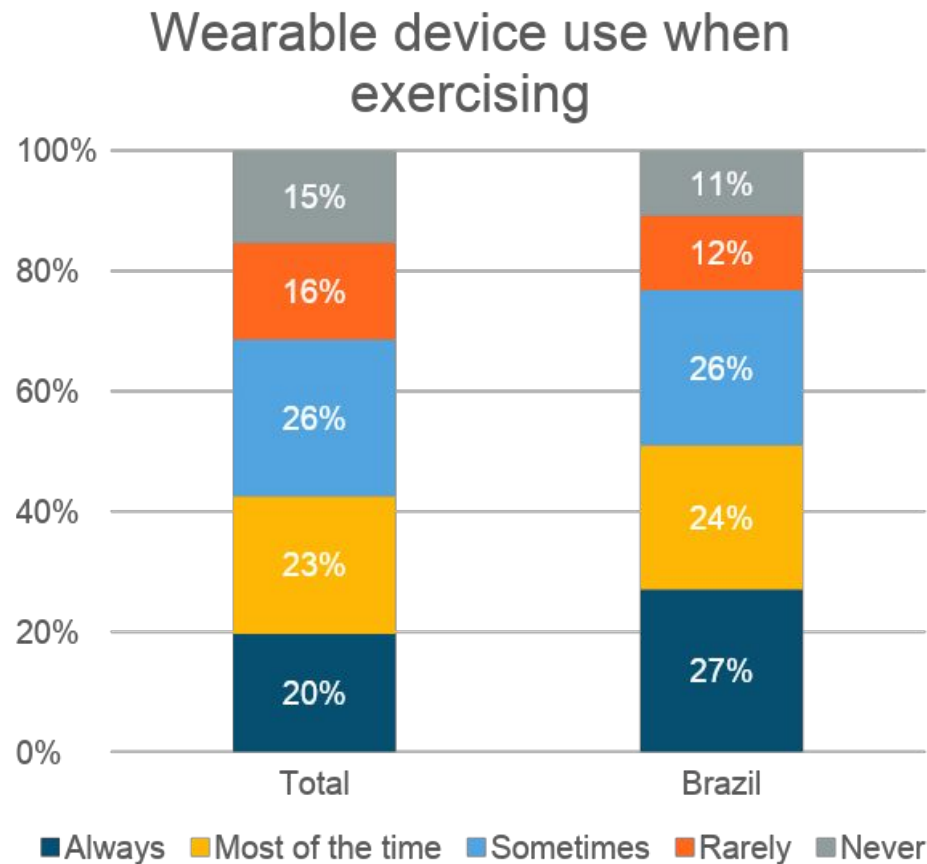
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Q: Which of the following best describes how much you spend every month on your health and wellness routines, including equipment, training, facility memberships and other costs?

Why Members Leave: Cost, Moving & Motivation Gaps



Wearables & Apps Are Shaping Fitness



Base: Among physically active consumers in major Latin American metro areas (n=2,984), Metro Brazil (n=814)

Q24: About how often do you use a wearable device to track location, hiking/running/walking distance or steps, or to compete/track your exercise or fitness with family and/or friends?

Key takeaways

01

Strong fitness culture

High exercise frequency and spending suggest a growing market

02

Strength & outdoor training dominate

Hybrid offerings can attract diverse consumer segments

03

Gyms are still central

Investment in equipment, convenience, and member experience is key

04

Tech matters

Wearable integration and digital engagement can enhance loyalty

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