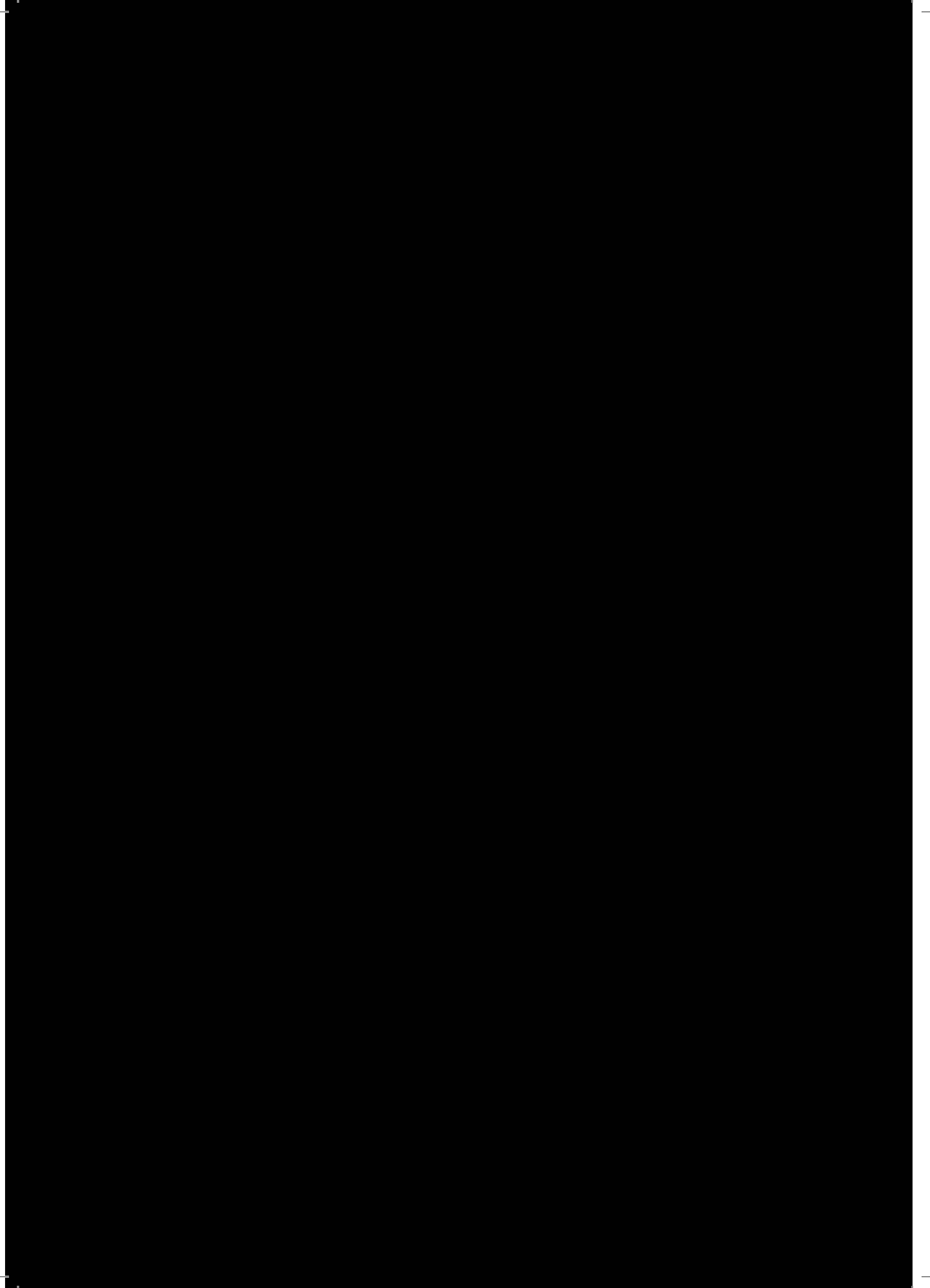




# India's emerging fitness economy

## India fitness market report 2025

**September 2025**



# Table of contents

<b>Deloitte foreword</b>	<b>4</b>
<b>Health &amp; Fitness Association foreword</b>	<b>5</b>
<b>Introduction</b>	<b>6</b>
<b>Methodology</b>	<b>8</b>
<b>Key takeaways</b>	<b>11</b>
<b>Overview of the global and Indian fitness markets</b>	<b>13</b>
<b>Indian market segmentation</b>	<b>16</b>
Facility market segments	17
Geographical market segments	18
<b>Fitness demand funnel</b>	<b>19</b>
<b>Consumer insights</b>	<b>21</b>
<b>Industry outlook</b>	<b>24</b>
Challenges and opportunities	25
<b>Summary tables</b>	<b>26</b>
Country profile	26
Geographical segment statistics	26
Facility market segment statistics	26
<b>References</b>	<b>26</b>
<b>Connect with us</b>	<b>28</b>

# Deloitte foreword

We are at the dawn of a new era in India's wellness journey, one where fitness is no longer a niche aspiration but a national movement. With immense pride and purpose, we present the India fitness market report 2025, a forward-looking exploration of the forces shaping this transformative industry.

This report is more than a collection of data points; it reflects a cultural shift. Across cities and communities, from bustling metros to emerging towns, millions of Indians are embracing fitness as a way of life. The momentum is undeniable, and the opportunities are immense.

At Deloitte, we envision a future where fitness is accessible, inclusive and integrated into the fabric of everyday life. This report outlines the path towards that future, highlighting the rise of hybrid models, the power of technology, the potential of underserved markets and the increasing demand for personalised and meaningful wellness experiences.

We believe the next few years will redefine what it means to be fit in India. This transformation will be driven by innovation, collaboration and a shared commitment to health and vitality. Whether you are an entrepreneur, investor, policymaker or changemaker, we encourage you to view this report as a blueprint and a call to action.

Together, let's build a healthier and stronger India.

Warm regards,



**Anand Ramanathan**  
Partner and Consumer  
Industry Leader  
Deloitte South Asia



**Praveen Govindu**  
Partner  
Deloitte India

# Health & Fitness Association foreword

It is my pleasure to introduce the 2025 India Fitness Market Report, a landmark study that highlights one of the most exciting growth opportunities in the global fitness industry.

India is home to the world's largest population, a dynamic and youthful demographic and a rising middle class increasingly focused on health and well-being. Although the country's current fitness facility membership rate remains below 1 percent, the market is on a steep growth trajectory and is expected to more than double in size by 2030.

Produced in collaboration with Deloitte, this report offers a detailed and data-driven view of India's evolving fitness landscape. It explores the country's diverse market, regional trends and emerging consumer behaviours while highlighting barriers that must be addressed to unlock full market potential.

For industry and public health leaders alike, the message is clear: India's fitness sector is on the rise. With continued innovation, strategic investment and supportive public policy, this market can deliver meaningful returns financially and improved health outcomes.

At the Health & Fitness Association, we are proud to support this momentum through research, advocacy and international collaboration. We hope the insights in this report inform your next steps and inspire bold action to build a stronger, more active future for India.

Sincerely,



**Liz Clark**

President and CEO  
Health & Fitness Association

# Introduction

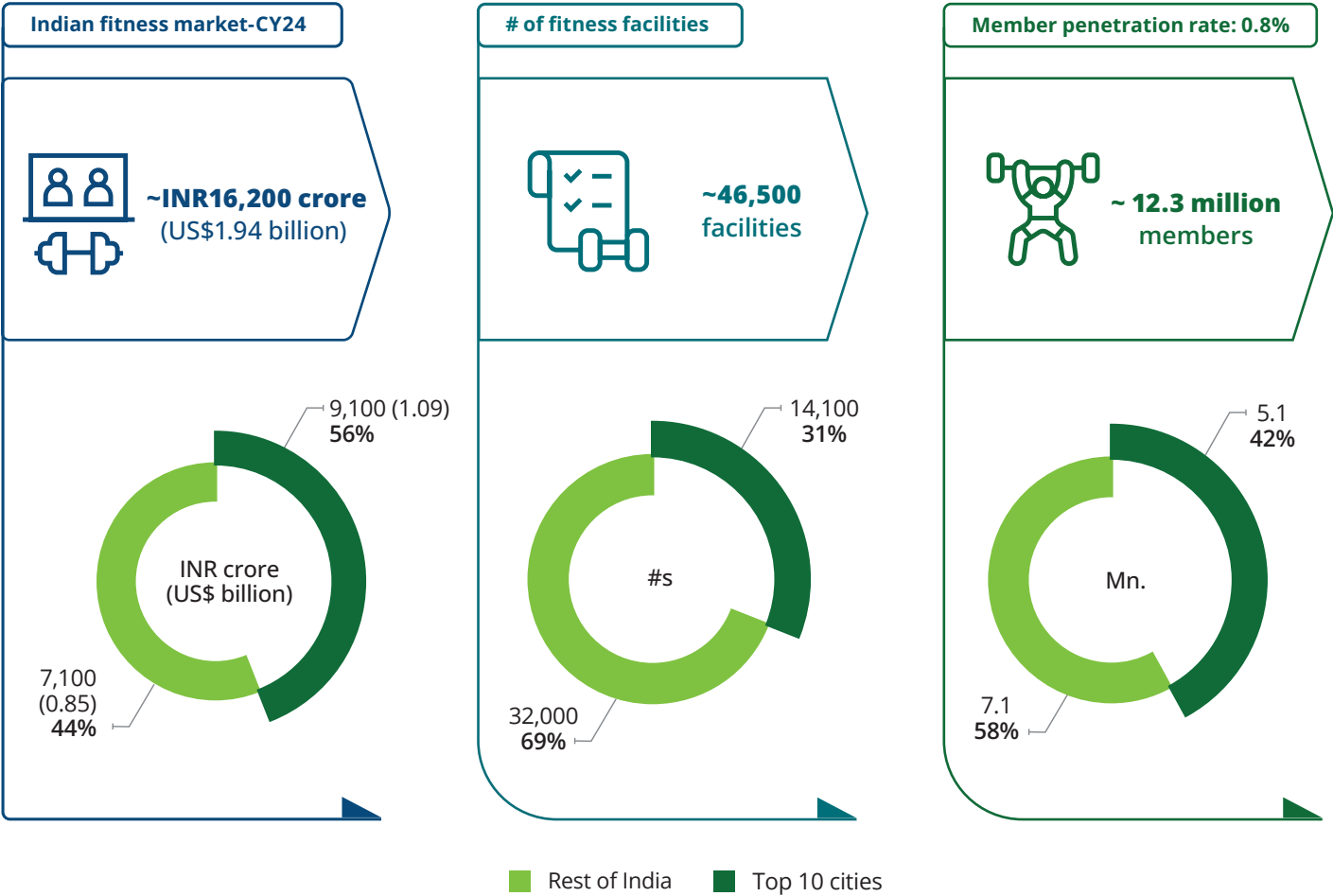


India's fitness market is transforming rapidly, fuelled by rising health awareness, technological innovation and changing consumer attitudes. Increasing disposable incomes, urbanisation, favourable demography and the proliferation of fitness culture contribute to this sector's development.

Summary: India fitness market in 2024

The fitness facility market size in India is estimated at ~INR16,200 crore, with more than 46,500 centres and 12.3 million members

US\$1 = INR83.68



(Source: Deloitte interview, research and analysis)

India's fitness facility landscape is fragmented, with only a few national-level operators. The current penetration of fitness facility membership in India is low and estimated to be less than 1 percent<sup>[a]</sup> of the population. The market is projected to grow at a double-digit rate, buoyed by new centre additions and increasing membership, which is expected to double by 2030.

This report explores the current state of the fitness services industry in India, highlights emerging trends and provides insights into potential growth areas. The primary objective of this study is to provide a comprehensive analysis of the current and future landscape of fitness services in India by:



estimating the current and future market size of offline fitness services in India;



analysing consumer behaviour in the fitness markets, focusing on active and inactive segments; and



providing a detailed market breakdown by segment.

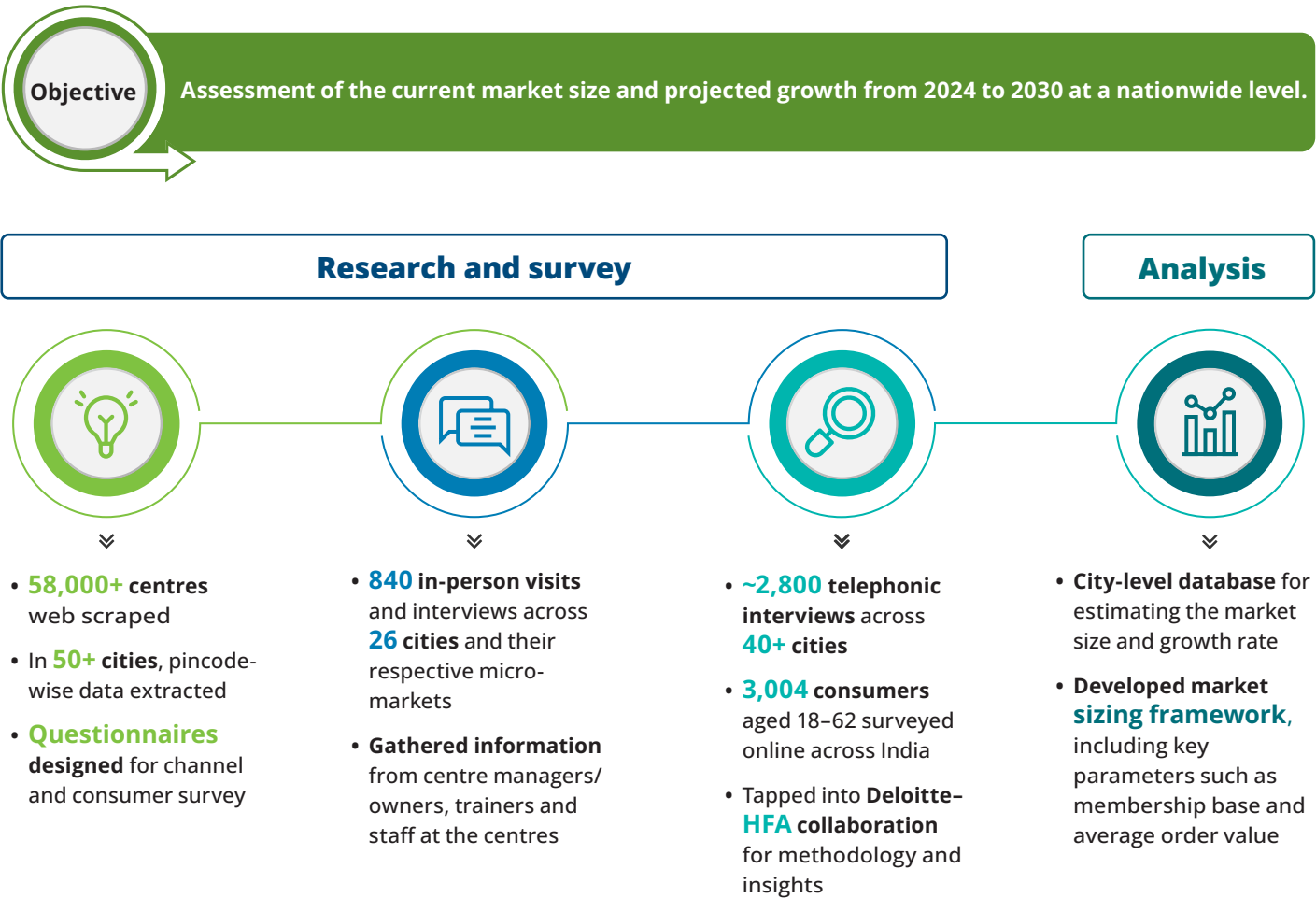
# Methodology





Fitness market – Methodology

Comprehensive primary and secondary research was conducted to estimate the current and future market



Data collection

The data collection was limited to commercial fitness facilities only. The market size, total members and number of fitness facilities exclude free public gyms, hotel gyms and corporate/ business facilities.

The research incorporated primary and secondary data collection methods. Primary data was gathered through the following ways:

- Web scraping of fitness facilities across India, with keywords such as fitness centre, gym, fitness studio, wellness centre and health club.

- Pin code-wise data extraction to provide city-specific market size estimates.
  - Consumer and channel surveys, including pan-India consumer surveys, telephonic interviews and in-person visits across 40+ cities.
- Interviews with fitness facility owners, trainers and managers to understand centre-specific dynamics.
- Secondary data was collected from industry reports, government databases and market research publications.

### Data analysis

Data was analysed using various statistical tools to estimate market size, growth rates and segment-wise performance. The market sizing framework incorporated key parameters, such as membership base, Average Revenue Per User (ARPU) and personal training contributions. Additionally, data was segmented geographically and by facility tier (value, premium and boutique).

### Assumptions

This analysis assumes stable macroeconomic conditions and continued momentum in health and fitness trends over the next few years.

The following assumptions guided the methodology:

#### Fitness market statistics

Fitness market statistics were estimated using resources listed under the "Methodology" section. Calculations for the number of facilities, average price of regular monthly membership fees, number of members and market size (industry revenue) were based on estimates from industry experts, first-hand observations, market analysis and records of club operators. The currency conversion rate used is US\$1 = INR83.68, the average conversion rate in 2024.<sup>[a]</sup> Primary consumer research also informed calculations for the number of fitness club members. Penetration rates were based on India's total population.

#### Market size (industry revenue)

The market size of the local fitness industry was estimated using the following calculation: Facility segment-wise (average price per year x number of members x number of centres) + personal training spending (where applicable).

### Definitions

- The fitness market is defined as structured, paid services offered by in-person gyms, fitness facilities and wellness clubs (hubs offering range of activities & programs for physical health), including personal training.
- Fitness facility/centre: A physical fitness club with training equipment and/or fitness classes.

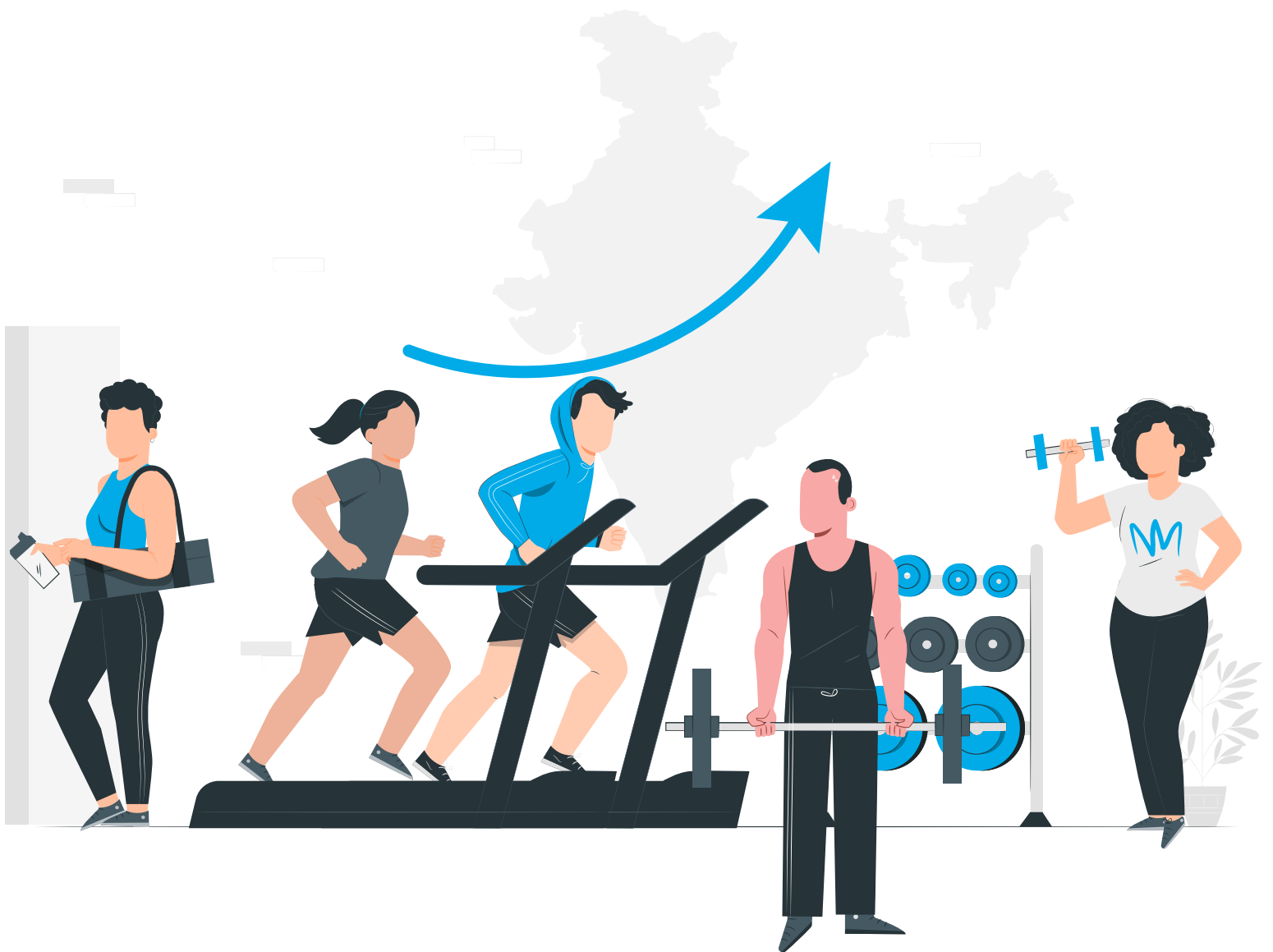
- Cities are segmented by population size, economic development and infrastructure.
- Top 10 metros: Bengaluru, Mumbai, Delhi NCR, Hyderabad, Chennai, Pune, Jaipur, Lucknow, Kolkata and Kochi.
- Rest of India: Remaining cities, towns and villages.
- Value facility: Membership fees range from less than INR8,000 to INR14,000 annually. These facilities offer basic services and a comprehensive experience with moderate upgrades in equipment, space (500–3,000 sq. ft.) and may have air conditioning. Many provide intermediate offerings with enhanced services, such as personal training, group classes and a steam room.<sup>[a]</sup>
- Premium facility: Memberships start at INR14,000 and go up to INR50,000 or more annually. Premium facilities boast expansive spaces (2,000–7,000 sq. ft.), advanced group classes and top-notch amenities, such as personal training, spa services and steam/sauna facilities. These facilities cater to an affluent clientele.<sup>[a]</sup>
- Boutique facility/centre: Membership fees are variable, with some boutique studios charging INR19,000 to INR30,000 annually. The floor space can range from a couple of hundred to the spacious thousands sq. ft. (300–6,000 sq. ft.). These facilities provide niche workouts such as HIIT, MMA, cycling, yoga and Pilates, offering a personalised and community-driven environment.<sup>[a]</sup>

### Sources

Data for this report was derived from market surveys, consumer interviews, facility visits and proprietary databases. Deloitte representatives travelled to fitness facilities around the country, met with industry operators, visited fitness facilities and mystery shopped. Some telephone interviews were also conducted if in-person interviews could not be scheduled. A consistent questionnaire was used to guide operator interviews.

Deloitte's strategic collaboration with industry bodies and fitness organisations was also used to gather insights.

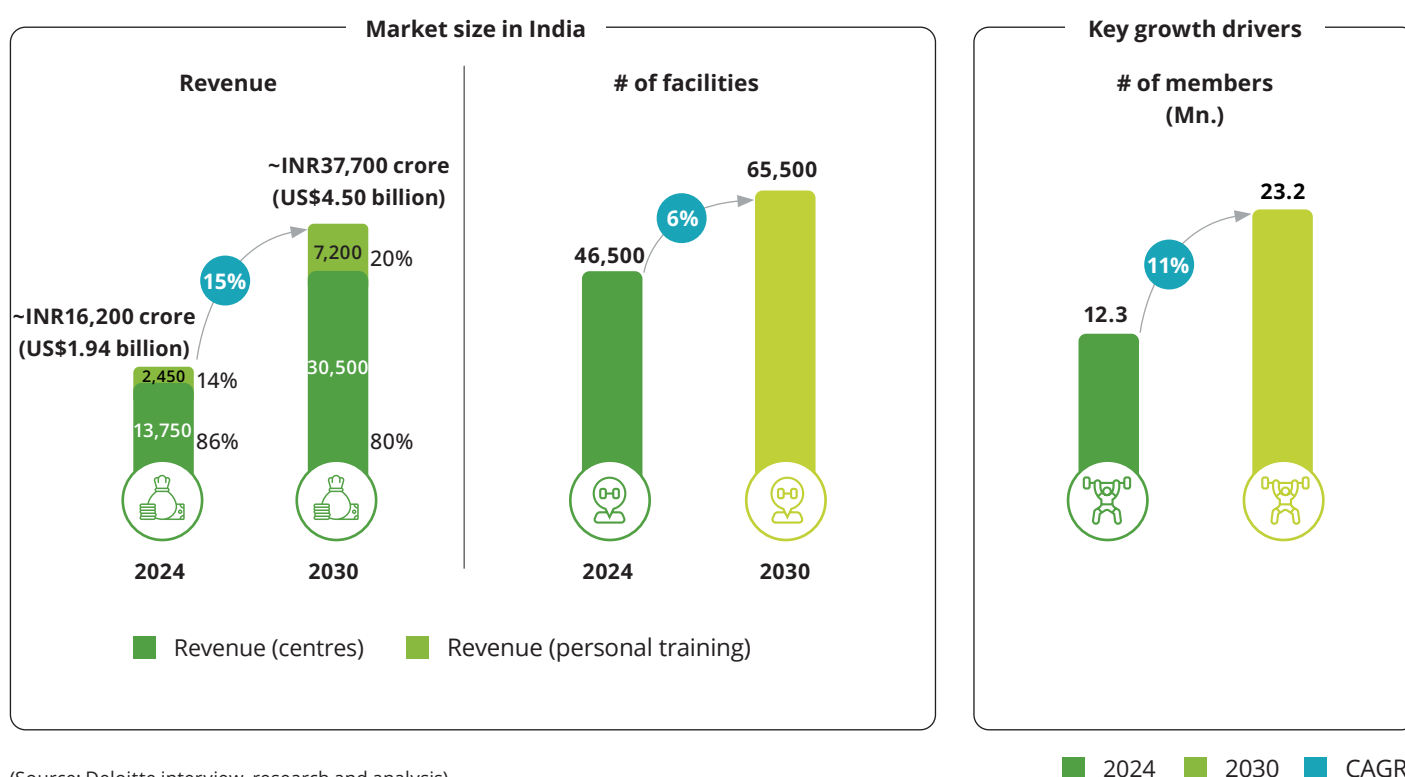
# Key takeaways



The Indian gym and fitness industry has exhibited robust growth patterns and the potential for substantial future expansion. The following are the topline statistics projected for the industry between 2024 and 2030.

**The fitness market is estimated post a CAGR of ~15 percent and reach ~INR37,700 crore (US\$4.5 billion) by 2030.**

Growth will be driven by an expected doubling of new member additions, supported by new centre openings and personal training services.



(Source: Deloitte interview, research and analysis)

- Industry revenue/market size:** The fitness market in India is valued at ~INR16,200 crore in CY24 and is expected to reach INR37,700 crore (US\$4.5 billion) by CY30 at a CAGR of 15 percent.<sup>[a]</sup>
- Member penetration rate:** About 0.8 percent of India's population is a member of fitness facilities, indicating significant room for growth. This share is projected to more than double by 2030, reaching 1.7 percent.<sup>[a]</sup>
- Number of members:** As of 2024, the total number of fitness facility members in India stood at ~12.3 million. Significant growth at an 11 percent CAGR between 2024 and 2030 is expected, particularly in top-tier cities. About 23.3 million Indians are expected to be members by 2030.<sup>[a]</sup>
- Number of fitness facilities:** India has about 46,500 fitness facilities, which is expected to post a 6 percent CAGR until 2030, driven by increasing demand in urban and rural areas. By 2030, 65,500 fitness facilities are expected to be in India.<sup>[a]</sup>

# Overview of the global and Indian fitness markets



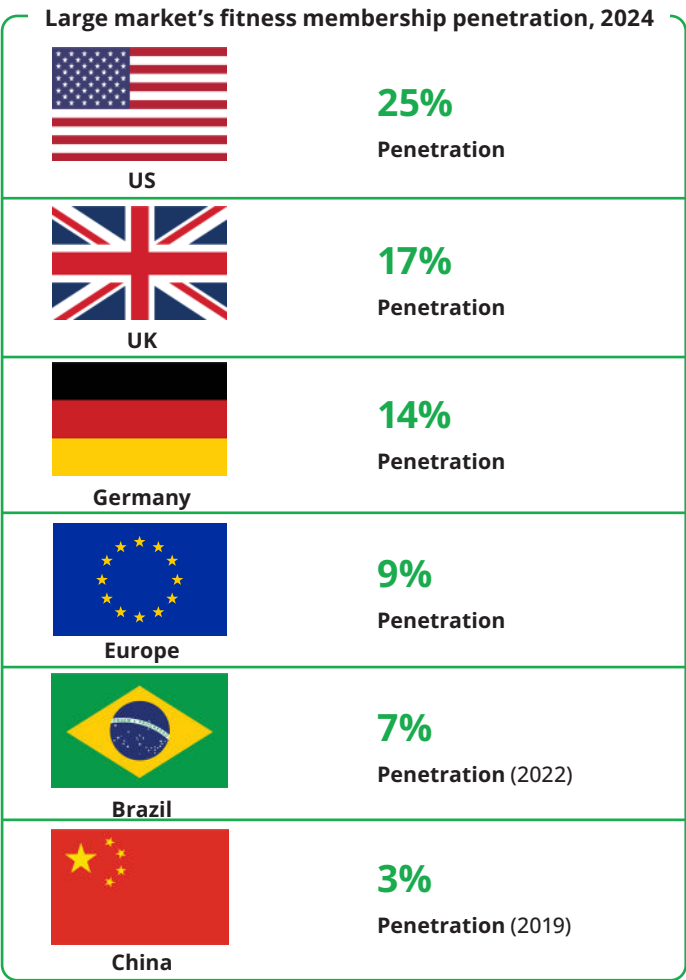
Global fitness industry

The global fitness industry has grown steadily over the past decade, increasing participation rates across age groups and geographies. By 2024, the number of fitness facility members was likely close to 200 million<sup>[b]</sup> globally. The US accounted for a substantial share of the market, reaching 77 million<sup>[c]</sup> members, while the broader European market reported nearly 72 million<sup>[d]</sup> members. In 2019, health clubs worldwide generated over US\$96 billion<sup>[e]</sup> in revenue. Beyond traditional gyms and health clubs, boutique fitness studios and specialised facilities have gained traction, offering diverse experiences, such as yoga, indoor cycling and group training programmes. This shift towards personalisation and growing awareness of physical health and wellness has fuelled innovation and growth across multiple industry segments.

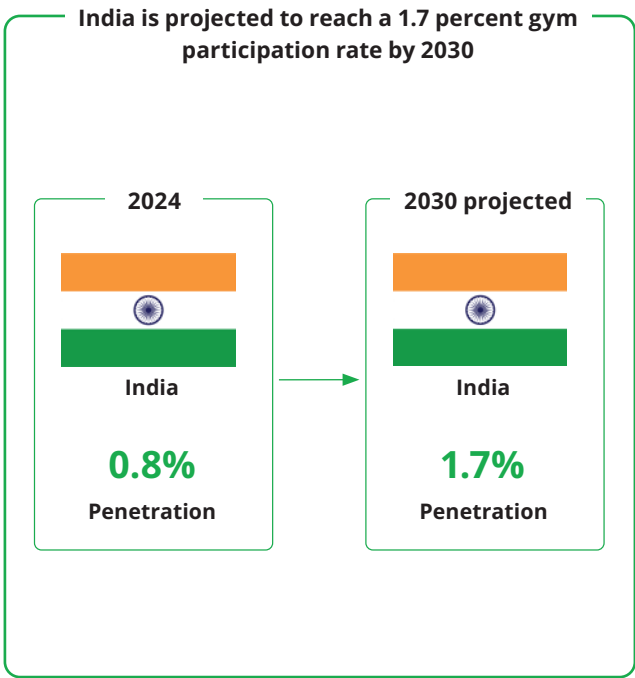
In addition to revenue and membership growth, the fitness industry is evolving to meet changing consumer preferences. Health club members seek holistic wellness solutions, including nutrition, mental health support and physical fitness. From mobile apps to wearable devices, fitness technology has also seen tremendous adoption, with more members engaging in virtual and hybrid fitness models. As the industry continues to expand globally, markets in Asia, Latin America and the Middle East are expected to witness accelerated growth, driven by rising incomes and a growing focus on health and wellness in these regions.

India's fitness journey has just started

At sub 1 percent penetration, fitness in India is still in its initial stages; penetration is expected to increase multifold over the next decade.



Note: US: Population of 6 years and above; Other countries: total population base considered



Country Penetration % : Gym or fitness club membership  
Source: 2025 HFA Global Report, European Health & Fitness Market Report 2025, EuropeActive, 2020 HFA Global Report

At just 0.8 percent, India's fitness membership penetration is still in its infancy, well behind other leading economies, such as China (3 percent) and the US (25 percent). But this gap represents enormous potential, with penetration expected to more than double to 1.7 percent by 2030.<sup>[a]</sup>

### India – A growing fitness market

India's fitness industry is experiencing rapid growth, driven by a rising middle class, increased disposable income and growing health and wellness awareness. While traditional gyms and fitness facilities remain popular, the market is witnessing the emergence of boutique studios, yoga centres and fitness franchises. Integrating technology, such as fitness apps and wearable devices, is also significantly shaping the Indian fitness landscape.

In 2024, India boasted the world's largest population, with over 1.4 billion people.<sup>[f]</sup> Its demographic profile is characterised by a young population, with a significant 65 percent<sup>[g]</sup> of the population under the age of 35. This demographic dividend presents opportunities and challenges for the country, as it seeks to harness its youthful energy for economic growth and development. However, rapid urbanisation and population pressures also pose significant challenges to accessibility to basic needs such as housing, education and healthcare.

India has made significant strides in improving public health outcomes through the National Health Mission, notably eliminating trachoma as a public health problem and launching the nationwide Measles–Rubella elimination campaign. In recent years, the Indian government has prominently prioritised preventive health and has launched several public health initiatives to promote fitness and improve overall health outcomes. Key among these is the Fit India Movement, launched in 2019, which encourages citizens to adopt healthier lifestyles through regular physical activity and balanced nutrition.

The Khelo India programme, launched in 2018, is designed to revive the sports culture at the grassroots level, focuses on creating sports infrastructure and promoting organised sports, contributing to a more active population. It aims to mainstream sports as a national, economic, community and individual development tool, promoting "Sports for Excellence" and "Sports for All." Additionally, initiatives such as Ayushman Bharat, 2018, the largest health assurance scheme in the world, focus on preventive healthcare through wellness centres that offer fitness programmes and yoga, addressing the increasing burden of lifestyle-related diseases such as diabetes, hypertension and obesity. These programmes are integral to fostering a culture of fitness and wellness in India, with long-term goals of reducing healthcare costs and improving the country's overall health.



# Indian market segmentation



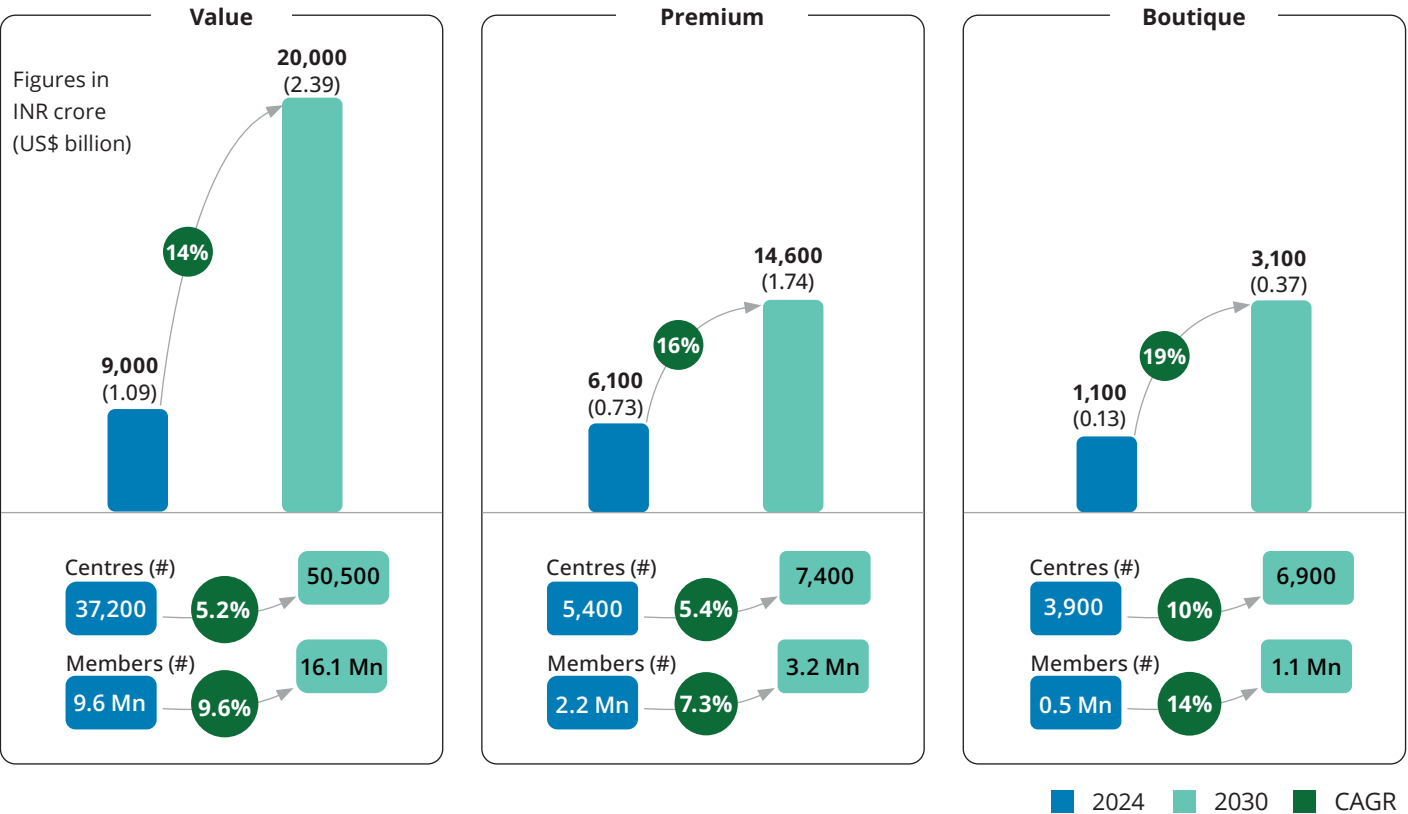


## Facility market segments

The fitness market in India can be divided into three distinct facility type segments, each catering to a different consumer base and budget. These segments are crucial for understanding demand patterns and market growth drivers. The market is not uniform across India, with significant differences in penetration, consumer preferences and service offerings based on geography.

**The value segment accounts for ~56 percent of market revenue, posting a 14 percent CAGR.**

Boutique is expected to lead growth with nearly 19 percent CAGR, followed by the premium segment.



(Source: Deloitte interview, research and analysis)

### Value

- **Characteristics:** These fitness facilities range from minimal amenities to a comprehensive experience with moderate upgrades in equipment, space (500–3,000 sq. ft.) and air conditioning. Many provide intermediate offerings with enhanced services, such as personal training, group classes and steam rooms.
- **Market share:** The value segment is the largest, contributing 56 percent to the fitness facilities market, 78 percent of the membership base and 80 percent of the total centres count. In 2030, the market revenue is expected to account for 53 percent, the membership base for 79 percent, and the facilities count for 78 percent.<sup>[a]</sup>
- **Price range:** Annual membership fees range from less than INR8,000 to INR14,000.<sup>[a]</sup>

### Premium

- **Characteristics:** These facilities are equipped with state-of-the-art machines, top-notch amenities such as personal training, spa services and steam/sauna facilities, offering a superior fitness experience. These facilities feature larger spaces (2,000–7,000 sq. ft.), advanced group classes and personalised training.<sup>[a]</sup>
- **Market share:** Premium centres, one of the fastest-growing segments, are projected to capture a larger market share by 2030. They form 38 percent of the market, with 18 percent of the membership base and 12 percent of the total centre count. The expected shares in 2030 are 39 percent for market revenue, 16 percent for the membership base and 11 percent for the facilities count.<sup>[a]</sup>
- **Price range:** Annual membership fees start at INR14,000 and can go beyond INR50,000.<sup>[a]</sup>

## Boutique

- **Characteristics:** The floor space can range from a couple hundred sq. ft. to the spacious thousands sq. ft. (300–6,000 sq. ft.). These fitness facilities provide niche workouts, such as HIIT, MMA, cycling, yoga and Pilates, offering a personalised and community-driven environment.<sup>[a]</sup>
- **Market share:** Boutique, a small segment with a 7 percent market share, is expected to register a 19 percent CAGR, offering specialised services. It accounts for 4 percent of the

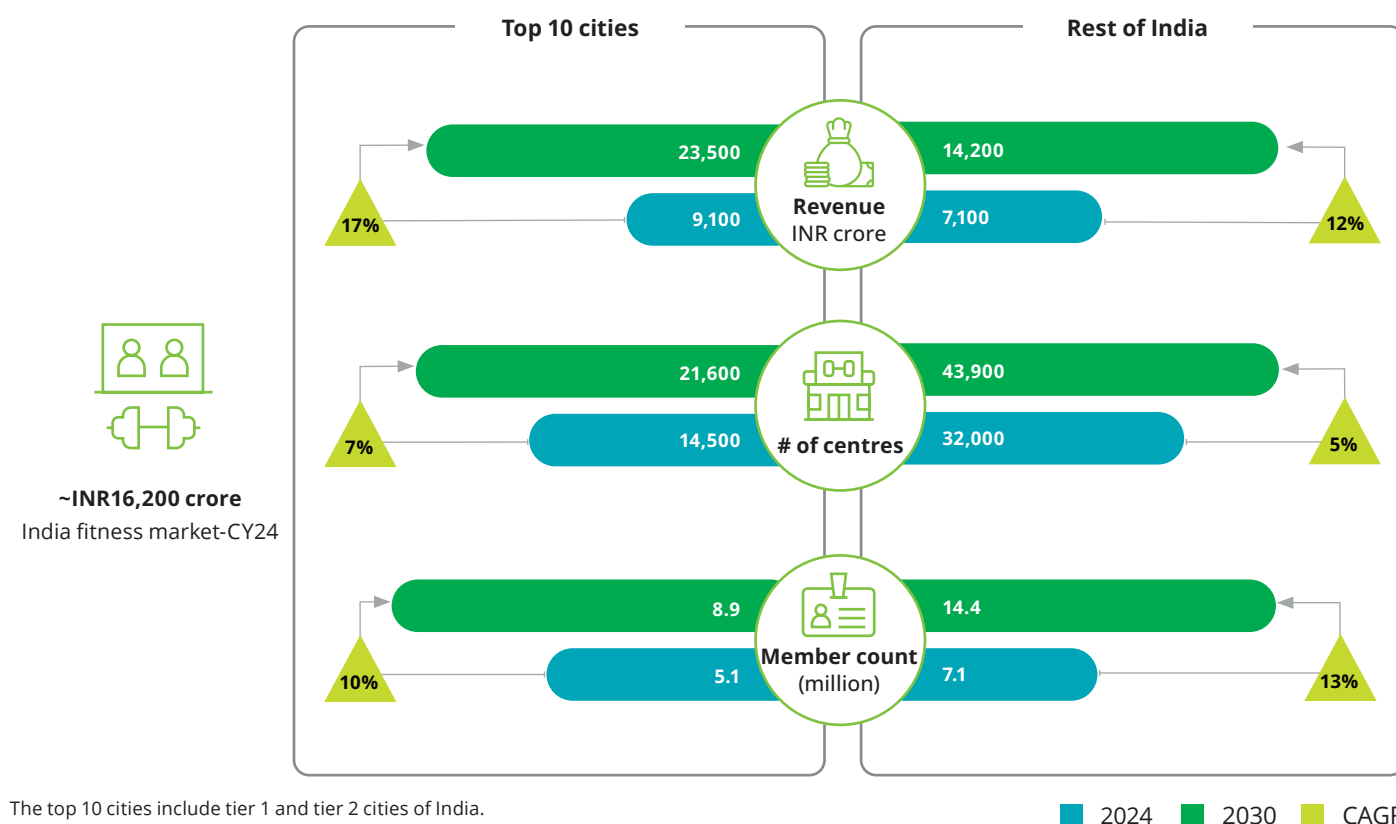
membership base and 8 percent of the facilities count. This segment will likely account for 8 percent of market revenue, 5 percent of membership base and 11 percent of facilities count in 2030.<sup>[a]</sup>

- **Price range:** Memberships are variable, with some boutique studios charging INR19,000–30,000 annually.<sup>[a]</sup>

## Geographical market segments

### India | Fitness market – Cities

Top 10 cities contribute over 56 percent to the market revenue and account for 42 percent of the membership base.



The top 10 cities include tier 1 and tier 2 cities of India.  
(Source: Deloitte interview, research and analysis)

### Top 10 cities

- Mumbai, Delhi NCR, Bengaluru, Hyderabad, Chennai, Pune, Jaipur, Lucknow, Kolkata and Kochi.
- These are the most mature markets, with significant investments in high-end fitness chains (the premium and luxury segments). These cities account for 56 percent of the market revenue and 41 percent of the total membership base, with only 31 percent of centres located here.<sup>[a]</sup>

### Rest of India

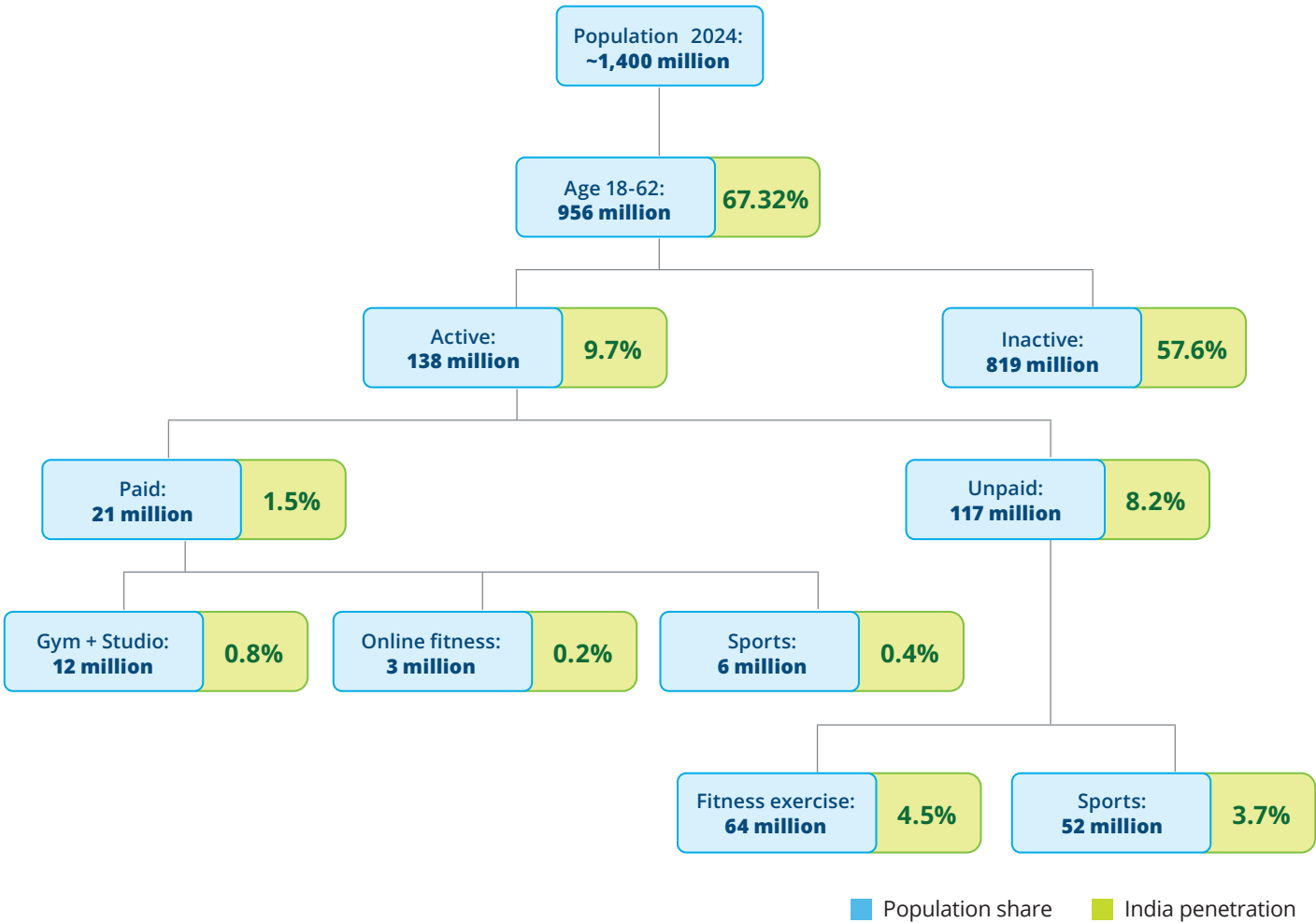
- Encompasses tier-2 and lower tier cities; many of which remain untapped.
- This segment remains largely untapped but holds immense growth potential due to increasing urbanisation and fitness awareness in cities in tier-2 and lower-tier. Affordable fitness chains that can penetrate these markets stand to gain the most.

# Fitness demand funnel



Fitness demand

Currently, 138 million people, ~10 percent of India's population, are actively involved in physical activities.



Active physical activities – Involved in intentional exercise, excluding walking, cycling, stair climbing, etc. as part of daily chores  
(Source: Deloitte interview, research and analysis)

From India's 1.4 billion total population in 2024, 956 million are in the target fitness market age group of 18–62 years. Of this target age group, only 138 million are physically active through paid or unpaid activities, such as using fitness facilities, online fitness, sports, walking, cycling and yoga. However, the paid active population is a small share of 15 percent, compared with the 85 percent unpaid active population.<sup>[a]</sup>

Inactive population

A sizable portion of the population remains inactive, and the share is highest in lower household income segments (up to INR5 lakh annually). Women show higher inactivity compared with men.

Unpaid fitness activities

This segment includes individuals who engage in informal fitness activities, such as running, cycling or playing outdoor and indoor games without paid memberships. This untapped segment presents an opportunity for affordable fitness solutions and community-based programmes.

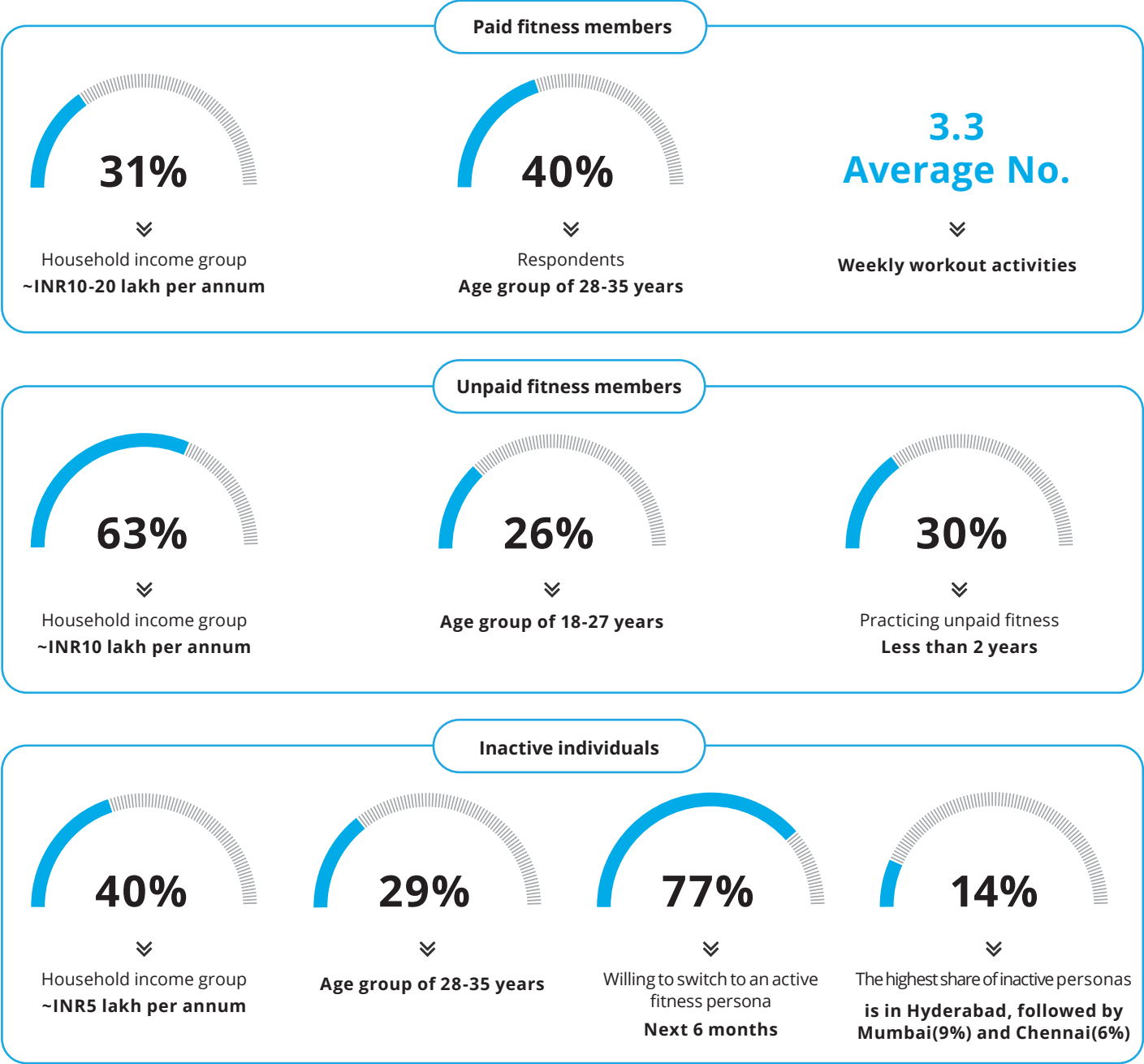
A higher share (55 percent)<sup>[a]</sup> of the unpaid fitness-active population participates in fitness activities, which are further equally distributed between leisure unstructured activities, such as walking, running and cycling, and formal structured activities, such as online training, group classes and apartment or office workouts.

# Consumer insights



The growing fitness culture in India is driven by evolving consumer behaviour and preferences. Based on fitness participation, we have identified the following primary personas:

- Paid fitness members – Actively engage in organised paid exercise. They are committed to fitness and value structured, professional environments for workout activities.<sup>[a]</sup>
- Unpaid fitness individuals – They prefer free or low-cost workout facilities, such as community centres, outdoor facilities, home fitness and free online content. Focusing on cost-effective exercise options.<sup>[a]</sup>
- Inactive Individuals – Neither involved in workout exercises nor sports activities. Their lifestyle is less focused on structured fitness involvement.<sup>[a]</sup>

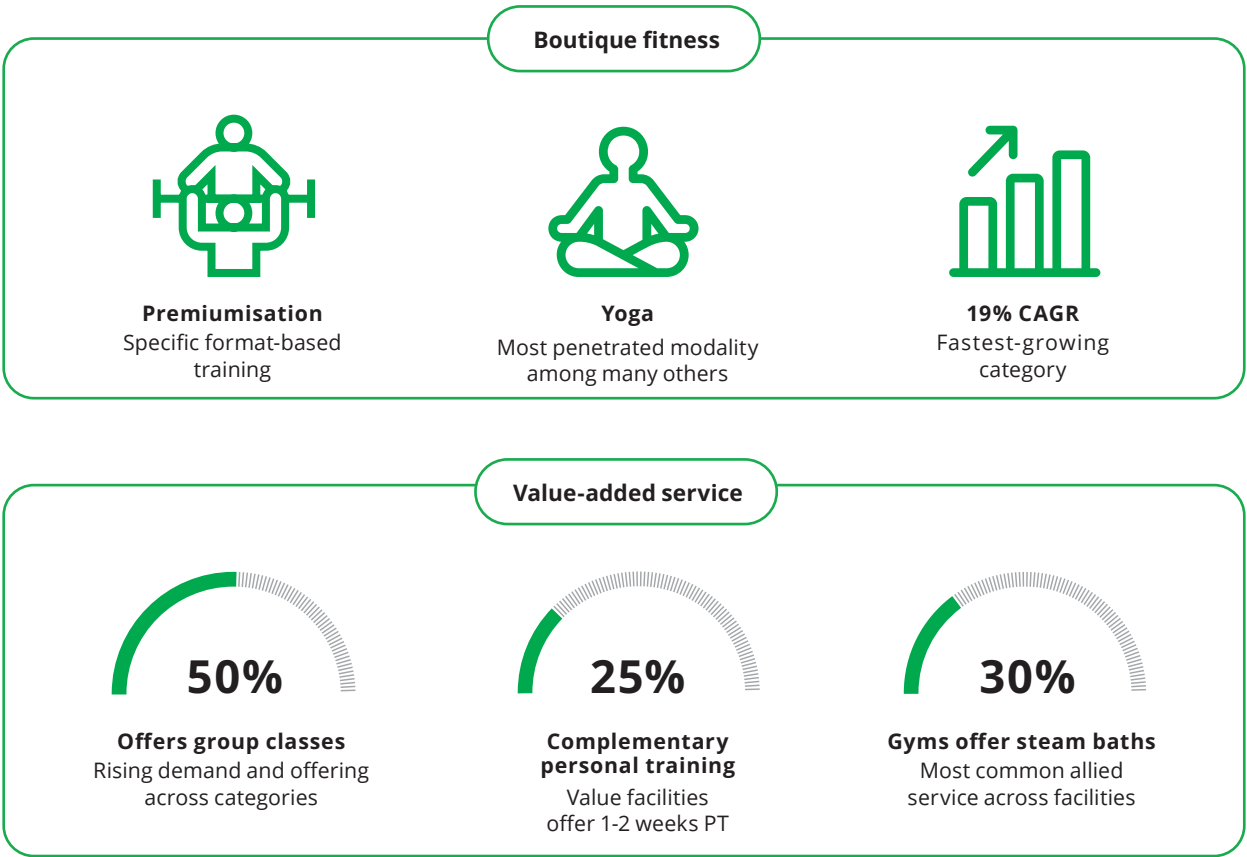


Below are some more insights based on consumer surveys:

- **Target demographics:** The 28–35 age group dominates the fitness market, with 54 percent actively engaging in paid fitness activities. Higher-income households are more likely to invest in fitness activities.<sup>[a]</sup>
- **Health/Fitness motivators:** Appearance is the primary motivator for first-time fitness membership purchases, with 54 percent citing physical appearance as a driver. Health concerns (26 percent) and social influences (14 percent) also play a significant role.<sup>[a]</sup>
- **Dropout and rejoin:** About 48 percent of individuals who discontinued fitness memberships are willing to rejoin. About 32 percent discontinue fitness membership as a temporary break, and an equal percentage discontinue to switch to home workouts.<sup>[a]</sup>
- **Barriers:** About 52 percent of non-members said affordability was the primary reason for not joining a fitness facility. And 50 percent of non-members claim they do not want to change their daily routine for fitness activities.<sup>[a]</sup>

Key insights | Fitness market survey

Rise in boutique fitness format, expansion of non-core services and the increasing demand for comprehensive fitness services are some of the key insights from the supply study.



(Source: Deloitte interview, research and analysis)

Yoga is the most popular fitness activity, and premium boutique fitness services such as yoga, body weight exercise and group exercise regimens are the fastest-growing category. Value-added services are gaining traction as they are not widely offered or available at many fitness centres. For example, 50 percent offer group classes and 30 percent offer a steam bath as a service.

# Industry outlook





India's fitness industry is poised for robust growth over the coming years, with several factors driving this expansion.

- **Market revenue:** From CY24 to CY30, the fitness market size is projected to post a CAGR of 15 percent. The CAGR of fitness centres is 6 percent, and the membership base CAGR is 11 percent. The top 10 cities are projected to grow the fastest in market size, at 17 percent.[a]
- **Growth drivers:** Key growth drivers include the increasing disposable incomes, greater urbanisation, rising awareness of health and fitness, and government initiatives. In addition, fitness apps, boutique facilities and personal training services are expected to drive growth.
  - Rising middle class: The growth of the middle class, with increased disposable income, has fuelled the demand for fitness services.
  - Urbanisation: Rapid urbanisation has led to a surge in the number of fitness facilities in cities.

- Changing lifestyles: Increasing awareness of health and wellness among Indians has driven the demand for fitness activities.
- Technology adoption: Fitness apps, wearable devices and virtual workouts are gaining popularity in India.
- Government initiatives: Programmes promoting health and fitness have contributed to the industry's growth.

#### Key trends

- Hybrid fitness models: Integrating online fitness platforms with offline services has become a significant post-pandemic trend.
- Rising affluence: As incomes rise, consumers are increasingly willing to invest in premium and luxury fitness services.
- Technological integration: Wearable fitness devices, mobile apps and AI-driven personal training are shaping consumer experiences.

## Challenges and opportunities

### Challenges

- Infrastructure: Most tier-2 and lower tier cities lack adequate fitness infrastructure.
- Retention: A major challenge in the fitness industry is retaining consumers, as many discontinue for home workouts or temporary breaks.
- Price sensitivity: Most consumers prefer affordable options, making it difficult for premium segment to gain widespread traction.

### Opportunities

- Unpaid segments: There is significant potential to convert unpaid fitness enthusiasts into paying customers through community-driven, low-cost options.
- Government initiatives: Programmes such as Fit India and Khelo India offer opportunities for growth in fitness.
- Corporate wellness programmes: Companies increasingly invest in employee wellness programmes, driving demand for fitness memberships and services.

# Summary tables

## Country profile

(Source: Deloitte interview, research and analysis)

Metric	2024 (Current)	2030 (Projected)
Total market size (INR crore)	16,200	37,700
Number of fitness facilities	46,500	65,500
Number of members (million)	12.3	23.2
Penetration rate (%)	0.8	1.7

## Geographical segment statistics

(Source: Deloitte interview, research and analysis)

Segment	2024 revenue (INR crore)	2030 revenue (INR crore)	CAGR 2024-2030 (%)
Top 10	9,100	23,500	17.2
Rest of India	7,100	14,200	12.2

## Facility market segment statistics

(Source: Deloitte interview, research and analysis)

Segment	2024 revenue (INR crore)	2030 revenue (INR crore)	CAGR 2024-2030 (%)
Value	9,000	20,000	14.2
Premium	6,100	14,600	15.7
Boutique	1,100	3,100	18.8

# References

[a] Deloitte interview, research and analysis  
[b] <https://wod.guru/blog/gym-membership-statistics/>  
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# About Health & Fitness Association

The Health & Fitness Association (HFA) is a not-for-profit trade association representing the global fitness industry of over 200,000 health and fitness facilities, studios, and their suppliers. As one of the world's leading authorities on the commercial fitness industry, HFA is the source of primary fitness facility consumer research and regularly conducts industry and fitness facility operator studies. HFA publishes Health & Fitness Business (formerly CBI), the industry's leading monthly periodical, and hosts several important industry events, including The HFA Show, an annual global conference and trade show, The HFA European Congress, and the HFA Fly-In and Advocacy Summit.

HFA and its members are devoted to making the world happier, healthier, and more prosperous through regular exercise and activity promotion.

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