

European Health and Fitness Market: Analysis By Value, By Membership, By Club, By Region Size and Trends with Impact of COVID-19 and Forecast up to 2026

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Abstracts

The European health and fitness market in 2021 was valued at US\$22.94 billion. The market is expected to reach US\$32.55 billion by 2026. Health has been defined by the World Health Organization as a state of complete physical, mental and social well-being, and not merely the absence of disease or infirmity. It includes aging well, longevity, quality of life, freedom from pain, etc. Fitness, on the other hand, is defined as a set of attributes that people have or achieve that relate to the ability to perform physical activity.

Exercising regularly is the single most important thing one can do to improve their health and fitness. In the short term, exercise helps to control appetite, boost mood, and improve sleep. In the long term, it reduces the risk of heart disease, stroke, diabetes, dementia, depression, and many cancers. Fitness clubs are beneficial for people to remain physically active, healthy, and fit. The European health and fitness market growth is to be driven by key structural trends such as urbanization, public health promotion, fitness technology and employee well-being programs. The market is expected to grow at a CAGR of 7.25% during the forecast period of 2022-2026.

Market Analysis:

By Membership: The report provides analyses of the European health and fitness market based on membership. In 2021, the membership in the market reached 56.86 million owing to the growing interest of people in staying fit and the emergence and growing popularity of boutique fitness. In addition to this, the growing trend of hybrid

membership and virtual training has given the flexibility to the members to exercise anywhere and anytime.

By Number of Clubs: The report provides the estimation of the number of clubs in the European health and fitness market. The number of health and fitness clubs in the European market is expected to reach 87.42 thousand clubs by 2026. The number of fitness clubs and centers is actively growing. This is mostly because more people have expressed interest in going to the gym, hence why the number of independent neighborhood gyms has also increased.

By Region: In the report, the European health and fitness market is divided into six regions: Germany, the UK, France, Italy, Spain, and Rest of the Europe. In terms of value, in 2021, Germany accounted for a significant share in the European health and fitness market i.e. around 20%, as Germans are seeking to reduce stress and stay fit, therefore more and more people are joining fitness clubs. In terms of the number of clubs, Germany held a share of approximately 15% in the European health and fitness market owing to the increasing obesity and increase in lifestyle-related diseases. This has increased the demand for joining fitness clubs.

European Health and Fitness Market Dynamics:

Growth Drivers: One of the most important factors impacting the health and fitness market is the growing fitness club membership penetration rate. People are getting more aware that exercise improves energy levels, decreases medical expenses, and likely increases longevity. In addition to this, people can also expect mental health improvements and more energy on a daily basis. Because of this, fitness has become a trend for millions of people, leading to a rapid increase in the fitness penetration rate. Despite the fact that the vast majority of people now live more sedentary lives, an increasing number of individuals are opting for a more proactive lifestyle. Furthermore, the market has been growing over the past few years, due to factors such as favorable demographic changes, the rise of lifestyle-related illnesses, an increasing number of social media users, growing personal disposable income, increasing obesity, and an increasingly-health conscious audience, etc.

Challenges: However, the market has been confronted with some challenges specifically, lack of skilled and professional trainers, the high cost of setting up a club, etc.

Trends: The market is projected to grow at a fast pace during the forecast period, due to

various latest trends such as the increasing adoption of virtual reality in training, growing use of fitness wearables, the evolution of hybrid gym memberships, technological advancements, etc. There is an increase in gyms offering hybrid memberships. Many traditional gyms are noticing that members want to have the option to work out either online or in-person. A hybrid gym offers the best of both worlds and includes a combination of in-person and online workout options. For example, a gym may offer in-person exercise classes that are also live-streamed or available on-demand for members who want to continue with home workouts. On the other hand, hybrid gyms help to reach more people. Therefore, the growing trend of market hybrid gym memberships is expected to propel market growth in the coming years.

Impact Analysis of COVID-19 and Way Forward:

The COVID-19 pandemic has adversely affected the European health and fitness market in the year 2020. The COVID-19 pandemic caused governments to enforce multiple lockdown across Europe. This led to the most clubs being closed due to COVID-19 restrictions for at least a few months throughout the year. This marked a significant decline in the European health and fitness market in 2020, clearly pandemic driven. COVID-19 has accelerated the adoption of a hybrid model of online/in-person workouts that more brick-and-mortar gyms are likely to retain when the pandemic recedes. Moreover, fitness innovations are accelerated in response to COVID-19 constraints. More cutting-edge virtual and real-world experiences, including holographic technologies, are anticipated in the near future. Therefore, as the innovations increases, the market is expected to experience growth in the post-COVID era.

Competitive Landscape:

The European health and fitness market is highly fragmented. Fitness club operators in general compete on the basis of flexibility and prices of the membership model, location of the clubs, brand recognition, quality, and the overall variety of the product offering and the training equipment. The key players of the global health and fitness market are:

Basic-Fit

PureGym

SATS Group

Virgin Group Ltd. (Virgin Active)

RSG Group GmbH

The Gym Group PLC

David Lloyd Leisure

FitX

Fitness First

Clever Fit

Alex Fitness

Keep Cool

VivaGym Group

Considering the high degree of fragmentation and high competition pressurizing smaller players who lack the necessary scale to compete on pricing, the market is ripe for consolidation. This has been the case for a few years already with a merger and acquisition (M&A) in the European health and fitness market having increased from 16 in 2020 to 19 in 2021. On the other hand, the increased polarization and differentiation among operators in recent years has been a result of the rapid expansions of the number of fitness clubs, particularly budget clubs. For instance, in 2021, the number of clubs operated by Basic-Fit increases to 1,015 from 905 clubs in 2020.

Scope of the Report:

The report titled “European Health and Fitness Market: Analysis By Value, By Membership, By Club, By Region Size and Trends with Impact of COVID-19 and Forecast up to 2026”, includes:

An in-depth analysis of the European health and fitness market by value, by membership, by number of clubs, by region, etc.

The regional analysis of the health and fitness market, including the following

regions:

Germany

The UK

France

Italy

Spain

Rest of the Europe

Provides an analysis of the COVID-19 impact on the European health and fitness market.

Assesses the key opportunities in the market and outlines the factors that are and will be driving the growth of the industry. Growth of the overall health and fitness market has also been forecasted for the period 2022-2026, taking into consideration the previous growth patterns, the growth drivers, and the current and future trends.

Evaluation of the potential role of health and fitness services to improve the market status.

Identification of new technological developments, R&D activities, and product launches occurring in the health and fitness market.

In-depth profiling of the key players, including the assessment of the business overview, market strategies, regional and business segments of the leading players in the market.

The recent developments, mergers and acquisitions related to mentioned key players are provided in the market report.

The in-depth analysis provides an insight into the market, underlining the growth rate and opportunities offered in the business.

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