

Saudi Arabia Health and Fitness Club Market By Revenue System (Membership Fees, Personal Training and Instruction Services, Others), By End User (Men, Women), By Region, Competition Forecast & Opportunities, 2020-2030F

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Abstracts

Market Overview

The Saudi Arabia Health and Fitness Club Market was valued at USD 1.14 billion in 2024 and is projected to reach USD 1.79 billion by 2030, growing at a CAGR of 7.87% during the forecast period. This market is expanding rapidly, supported by rising health consciousness, technological innovation, and supportive government reforms. Fitness facilities across the Kingdom are evolving with the integration of smart equipment, digital platforms, and personalized wellness solutions. As of 2022, 48.2% of Saudi residents engaged in regular physical activity, signaling growing public interest in fitness. Women's participation in fitness is also increasing, highlighted by initiatives like the Public Investment Fund's launch of a women-focused fitness company in 2023. The fitness ecosystem is diversifying with more women-only gyms, tech-driven solutions, and hybrid offerings, making health and wellness more accessible and inclusive.

Key Market Drivers

Government Initiatives and Vision 2030 Reforms

A central force behind the growth of Saudi Arabia's fitness industry is the government's Vision 2030, which aims to significantly increase physical activity among citizens—from 13% in 2015 to 40% by 2030. This commitment is supported by a variety of programs promoting healthy lifestyles, including the development of public sports

facilities, fitness campaigns, and private sector partnerships. Public-private collaborations have also gained momentum; for instance, Leejam Sports partnered with the Ministry of Municipal and Rural Affairs and Housing in 2023 to improve quality of life. Additionally, employers are embracing corporate wellness programs, boosting gym memberships and promoting workplace health. These strategic efforts are laying a strong foundation for sustained market expansion and elevating the role of fitness in national health priorities.

Key Market Challenges

High Operational Costs and Market Saturation in Urban Areas

One major challenge in Saudi Arabia's fitness club market is the high cost of operations in metropolitan areas like Riyadh and Jeddah. Establishing and maintaining state-of-the-art facilities requires substantial investment in equipment, real estate, staff, and digital infrastructure. Rising utility and rental costs place added pressure on operators to balance service quality with affordability.

Urban markets are also facing saturation due to the rapid increase in gyms, studios, and international chains. This intense competition can lead to pricing pressures, customer churn, and over-reliance on promotions to attract members. Smaller and local operators often struggle to compete with larger brands that can offer comprehensive services and loyalty incentives. To survive in this environment, fitness clubs must differentiate through specialized offerings, technology integration, and superior member experiences.

Key Market Trends

Growth of Digital Fitness and Hybrid Membership Models

A key trend reshaping the Saudi fitness landscape is the adoption of digital fitness solutions and hybrid membership models. Consumers increasingly expect flexibility, prompting gyms to combine in-person experiences with digital platforms offering virtual classes, personalized coaching, and mobile app access.

Fitness brands such as Fitness Time are launching proprietary apps and digital services to meet these demands. Wearable technology, including fitness trackers and smartwatches, is also gaining popularity, helping users track progress and engage with their wellness goals. This digitally enabled approach is especially appealing to younger,

tech-savvy users and helps fitness clubs drive engagement, improve retention, and create customized wellness journeys. As this trend continues, fitness operators embracing digital transformation are likely to gain a competitive edge.

Key Market Players

Landmark Fitness Limited

RSG Group GmbH

World Gym International LLC

Leejam Sports Company (Fitness Time)

Arena Fitness Centers Saudi Arabia

Lava Fitness

Al Manahil Entertainment Co.

NuYu Fitness

Kinetico Gym

Armah Group

Report Scope:

In this report, the Saudi Arabia Health and Fitness Club Market has been segmented into the following categories, in addition to the industry trends which have also been detailed below:

Saudi Arabia Health and Fitness Club Market, By Revenue System:

Membership Fees

Personal Training and Instruction Services

Others

Saudi Arabia Health and Fitness Club Market, By End User:

Men

Women

Saudi Arabia Health and Fitness Club Market, By Region:

Western

Northern & Central

Eastern

Southern

Competitive Landscape

Company Profiles: Detailed analysis of the major companies presents in the Saudi Arabia Health and Fitness Club Market.

Available Customizations:

Saudi Arabia Health and Fitness Club Market report with the given market data, TechSci Research offers customizations according to a company's specific needs. The following customization options are available for the report:

Company Information

Detailed analysis and profiling of additional market players (up to five).

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