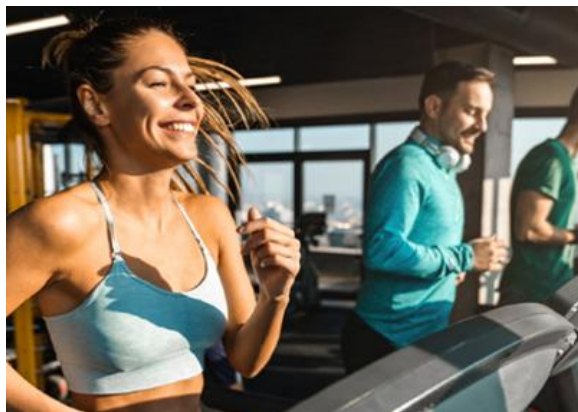


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“While some Brits are still nervous about visiting or returning to a gym, people are prioritising both their physical and mental health more than ever. Operators will need to develop more holistic services that enable consumers to incorporate activity from outside the gym, and harness new technologies for progress tracking.”
– Lauren Ryan, Leisure and Travel Analyst, 2 September, 2020

This report looks at the following areas:

- The impact of COVID-19 on the UK private health and fitness club market.
- Competition between online and offline fitness services.
- Key differentiators of health and fitness clubs.
- Consumer interest in additional services such as mental health and digital content.
- Consumer perceptions of leading health and fitness club providers.

14% of British adults state that including mental-health or emotional-wellbeing services as part of a gym membership would encourage them to return or join, increasing to 27% for those who were members just before COVID-19. The lockdown period intensified feelings of social isolation and these statistics highlight the potential role of fitness clubs as places of holistic wellbeing.

Some Brits are still nervous about visiting or returning to a gym, which highlights the need for operators to demonstrate what protective measures have been taken. As the virus clears and the economy recovers, demand for health and fitness venues is expected to return to, and eventually exceed, its pre-COVID level. As more Brits prioritise both their physical and mental health, venues will attract a wider audience.

The digital fitness sector has become increasingly crowded during the outbreak, with online exercise services now a must-have rather than a differentiator. Clubs will need a radical shift in thought to capitalise on the digital movement. The future of fitness will involve digital technologies regardless of location, creating a seamless fitness experience that customers can use anywhere and anytime.

Venues' role as community 'third places' has never been more critical. People need to feel connected with one another more than ever, and to have spaces outside of their own homes. There are new opportunities for operators to strengthen community ties and make clubs essential hubs of holistic wellbeing, particularly if they can tap into emerging lifestyle trends in the era of remote work.

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