



Moving Forward Together

RETHINKING, REBUILDING AND RENEWING FOR OUR SECTOR'S UNITY, INNOVATION AND GROWTH 2022 – 2025

With the generous support of EuropeActive's Vanguard Partners and President's Council Members:



1. FOREWORD

by David Stalker, President, and Andreas Paulsen, CEO of EuropeActive

At the doorstep to the post-Corona future

In the spring of 2020, a couple of months after the corona pandemic began to severely disrupt our sector, EuropeActive, as the pan-European health & fitness association, presented a strategy paper titled *Critically Rethinking for Successful Reopening*. This paper initiated extensive stakeholder consultation across EuropeActive's key stakeholder groups, from fitness club operators, suppliers, digital and tech companies to training providers, educationalists, exercise professionals, to academics, health professionals, political and other public decision-makers.

Facing the unknown immediate future of COVID-19 it was essential to our strategic planning that the concerns, insight, ideas, and best-practice of the diverse stakeholders which EuropeActive represent formed the foundation of our European association's development and leadership throughout the crisis.

The strategy paper for 2020 – 2021 described in general terms how EuropeActive was committed to supporting our sector during the pandemic, and presented a long list of essential strategic initiatives aimed at enabling EuropeActive to unite and lead the sector in Europe through the pandemic and beyond. Importantly, we launched our new permanent consultative stakeholder advisory boards, including our President's Councils, Scientific Advisory Board and Inclusion Advisory Group, to help guide EuropeActive on the associations' onward development and that of the broader European fitness and physical activity sector.

With the support of our stakeholder advisory boards we launched large-scale initiatives and projects across EuropeActive's different departments, which are all aimed at paving our sector's way into a future of new unseen opportunities. The envisaged overall goals for a promising sectoral future beyond COVID-19 were defined in EuropeActive's *Horizon 2025 Manifesto*, which was presented to the industry in the autumn of 2020.

EuropeActive's Manifesto – Health, Digital, Community & Standards

The four pillars or 'guiding stars' of EuropeActive's Manifesto, defining the association's overall journey and our sector's envisaged development through the coming years, are Health, Digital, Community and Standards. EuropeActive's major initiatives and projects are naturally aligned with these four essential areas of development.

Importantly, concrete examples of our initiatives under the four Manifesto pillars, we have launched *THiNK Active*, EuropeActive's research centre, and the *European DataHub* project. They will provide the necessary scientific evidence, fact-based knowledge and partnerships with the scientific community, in order to facilitate our sector becoming a recognised 'health solution' that is considered essential to public health and wellbeing in Europe.

The Corona pandemic disruptively taught our sector the importance of digital and tech infrastructure and innovative solutions in order to connect with consumers and end-users during the lockdowns. Great new insight and expertise about how to reach our consumers everywhere through digital means

grew out of the crisis, but as a sector we need to remain in the driver's seat of this critical development, and to move to a much more proactive approach to digitisation.

This has become more important in ensuring the continued innovation of new club operator hybrid, or 'triangular', business models that place the fitness club at the centre of a user ecosystem, which is underpinned by effective connecting digital platforms. Digital solutions and fit-tech have become the facilitating means connecting the fitness and exercise experiences of end-users far beyond their physical facilities, e.g. in the outdoors, in their home, or when travelling abroad, with their activities being directly connected into their 'home club'. These digital and fit-tech platforms will facilitate new kinds of exercise, including health and wellbeing offerings, outdoor physical activity, solutions being more easily accessible and inter-connected. In other words increasing coherent user-experiences in the lives of millions of customers who use our diverse products and services. Both fitness equipment and fit-tech suppliers have important roles to play in this development of connecting the end-user's exercise and health related activities in and around fitness and health clubs.

We consider this subject of developing the 'next gen' fitness and health club of central importance to ensuring the position of the fitness club as the highly valued 'third place', after home and work, in the life of Europeans. This 'third place' should enrich our end-users with great experiences not only around physical and mental health, but also for social wellbeing in the form of social relations around exercise and fitness. In building the next gen fitness and health club digital and tech is not an existential threat to European fitness clubs, but in our view a powerful catalyst that will take the physical fitness club into the future by making it much more accessible and much more connected to its end-users wherever they are.



The rapidly growing digital and tech part of our sectoral ecosystem is a vast asset in this regard. That is why EuropeActive asked members of our President's Council for Suppliers, Digital & Tech to supervise and support new educational publications, online and hybrid events in the area of digitisation, as well as to guide and fund the building of the European DataHub. Our clear ambition is to connect and unite our sector's growing number of digital and tech companies and to tap into their collective brainpower to ensure access to their advice and expertise by all actors across our industry.

In order to take the right, long-term decisions for our industry and businesses as we move further into the 2020's, we need to be better at understanding the wishes and behavioural patterns of our consumers. We believe that to a large extent we need to go through a paradigm shift or change of perspective towards becoming much better at looking at our sector from the consumer perspective. To understand the desires and needs of our end-users will better determine our business decisions. For that reason, EuropeActive, with the generous support of our President's Council for Operators, have decided to add a new annual chapter and sub-study to the European Health & Fitness Market Report on end-user behaviour and dynamics in the European fitness and physical activity market.

The Community pillar of EuropeActive's Manifesto above all is about building long-term trust and confidence in our sector, and our future status and role as a solution to public health challenges, for us to be recognised as such by relevant health and academic authorities. The Community pillar is also about our social responsibility and our constructive, fruitful interaction with the communities around us. It is of fundamental importance to this area that EuropeActive and our sector at large base our onwards journey on evidence-based knowledge. The research provided by THiNK Active and the experts of our Scientific Advisory Board, are central to reflecting the professional maturity of a well-established industry.

Furthermore, it is essential that we build strong trust-based connections with political decision-makers and relevant public authorities, to underscore our sector's essentiality and evidenced future potential for public health and next-generation healthcare systems in Europe. For that reason, thanks to the support of EuropeActive's President's Council for Operators, we are investing substantially in the association's public affairs capabilities and direct support for the industry's national trade associations across the continent.

Since its founding, EuropeActive has been an industry leader worldwide in the area of Standards for our sector. Professionally upskilling our workforce, in order to ensure our employees' professional identity and the quality of our services, as well as sufficient standards for our businesses' physical and virtual spaces is directly linked to the trust and confidence general society and our consumers place in us. Under the supervision and coordination of EuropeActive's Professional Standards Committee we have updated our European industry standards for professional practice during and after the new Corona reality. Additionally, EuropeActive updated its accreditation of training providers to factor in digital delivery of courses and educational programmes.

In collaboration with the European Committee for Standardisation (CEN), EuropeActive issued standards for operating safely as a fitness and health club during the pandemic. Finally, we crowned EuropeActive's work in the area of standardisation during 2020 – 2021 when we launched the FITcert.eu fitness club certification scheme with the Royal Netherlands National Standardisation authority NEN and under the auspices of CEN. This new certification scheme for fitness and health clubs in Europe is world-leading and will undoubtedly define quality-assurance of fitness and health clubs in Europe in many years to come.



Empowering our collective momentum towards 2025

Through multiple initiatives and projects launched by EuropeActive during the past two years, most of which were first presented to the industry in our strategy paper for 2020 – 2021, we believe that we will significantly empower our momentum forward as a sector and as a trade association, to reach our Horizon 2025 Manifesto goals. Therefore, in the immediate future, as we gradually move beyond COVID-19 and into a future of new opportunities and challenges, workflows will largely be characterised by consolidation of EuropeActive’s momentum and expansion of the association’s scope within the new structures pointed towards the goals defined in our strategic plans for 2020 – 2025 and our Sectoral Manifesto.

We have only just begun to reap the benefits and value of these ambitious projects and initiatives gradually launched since early 2020, but which have been based on incredible amounts of inputs, feedback, intellectual and financial support from EuropeActive’s members and key stakeholders. The coming couple of years will therefore be about fully exploring and optimising the benefits and potential of these initiatives, empowering and transforming our sector and its European trade association to reach our envisaged bright future.

Although it has certainly been EuropeActive’s ambition to boldly rethink to rebuild and renew, and thus to constructively and positively transform where necessary, during the pandemic, we also regard it as important to make sure to connect and be bridgebuilders between the pre-Corona past of our industry and the post-Corona future. All parts of our ecosystem should be able to take part in our collective sectoral forward journey. Hence, EuropeActive commits itself to be our sector’s bridgebuilding educational and supporting force, and cross-sectoral connecting, facilitating hub, on the road into the future.

Successfully reaching our goals for 2025 and beyond

We have established our permanent stakeholder advisory boards to inform and guide EuropeActive's path into the future. Based on the advice of industry representatives and experts we will undoubtedly have to moderately adjust our course now and then, as we aim to effectively represent, promote, develop and improve our sector in the coming years, with Health, Digital, Community & Standards remaining our steady overall guiding stars.

Whether our current Manifesto's vision will define EuropeActive's Horizon 2030 and 2035 will naturally be up to you, EuropeActive's members and stakeholders, when we reopen the process of imagining the next great chapter of EuropeActive's and our sector's journey beyond 2025. When the Corona pandemic might be little else than a distant memory.

We would like to sincerely thank everyone who have taken part in developing EuropeActive's two strategy papers for 2020 – 2021 and 2022 – 2025, from EuropeActive's Board Strategy Committee, Team and stakeholder advisory boards to all of you who are in touch with your European trade association on an ongoing basis to share your feedback, insight and ideas. Your support has been incredibly inspiring, motivating, and invaluable to ensuring EuropeActive's strong representative momentum during and after the pandemic. Furthermore, we are deeply grateful for the intellectual and generous financial support of the members of our President's Councils and other committed supporters of EuropeActive who have enabled us to launch highly ambitious initiatives at a very challenging time.

Dear members and supporters of EuropeActive, with your invaluable participation and insight we thoroughly rethought EuropeActive, enabling your European health & fitness association, to lead our sector and industry through its rebuilding and essential renewal during and after the pandemic. As a direct consequence our European trade association is stronger and better equipped than ever before to connect, develop, and lead the European fitness and physical activity sector into a bright future, which will continue to require our industry-wide unity and collaboration.

We began our strategic paper for 2020 – 2021, covering the peak period of the pandemic, by stating EuropeActive's most essential purpose and DNA: 'Europe' defines who we are, and 'Active' defines what we do as a sector. At the doorstep to 2022 our European sectoral ecosystem stands more interconnected and united than ever before, and the importance of our industry's purpose in European society, ensuring the physical, mental and social health and wellbeing of Europeans through fitness, exercise and physical activity, has never been greater.

We will conclude this introductory chapter to EuropeActive's strategy for the period of 2022 – 2025, titled Moving Forward Together - rethinking, rebuilding and renewing for our sector's unity, innovation and growth, by reaffirming our commitment to health and wellbeing on our continent, and as the united European voice for our industry to build partnerships for the promotion of fitness, exercise and physical activity across the world. In line with EuropeActive's mission and vision we will do our utmost to unify and empower our sectoral ecosystem to speak with one strong and coherent voice when it comes to our industry's common goals and objectives as we move out of the shadow of the corona pandemic and into a promising new decade.

April 2022



David Stalker, President



Andreas Paulsen, CEO

2. BRIDGEBUILDING BETWEEN THE PAST AND THE FUTURE OF OUR INDUSTRY

by Alfonso Jimenez, Board Member and head of THiNK Active, & Jennifer Halsall-de Wit, Board Member and Secretary of the President's Council for Suppliers, Digital & Tech of EuropeActive

Self-critique for self-improvement and self-empowerment

Successful evolution as an individual or as a collective is about being able to adapt effectively to the inevitable changes around you, without losing your core existential purpose and meaning. The Corona pandemic has profoundly been a test of our adaptability as a sector, of our individual and collective resolve to renew ourselves from within when the inevitable circumstances of the pandemic required it. And, to potentially use the challenges of the pandemic as a vehicle and opportunity to become better versions of ourselves, as our expected way ahead was fundamentally disrupted and the chips were down.

Although honest and profound self-critique can seem difficult and sometimes unpleasant, questioning our comfortable preconceptions and well-known ways and habits, it is in any event a prerequisite for effective self-adjustment, self-improvement and self-empowerment for the changing realities of the future. Constant self-adjustment through reasonable self-critique is an effective strategy to be able to preserve one's individual or collective core purpose in an ever-changing world. In fact, proactive, well-informed self-transformation for the future seems to be a lot more feasible when a strong sense of

MOVING FORWARD TOGETHER

With the generous support of EuropeActive's President's Councils





robust, meaningful inner self, of who I am and who we are essentially, persists through changing circumstances. An essential premise is of course that this identity corresponds reasonably with internal and external realities.

Defining our European trade association's core purpose

As EuropeActive's Strategy Committee, supervising the association's strategic development through and beyond the pandemic, it has been essential to us to define EuropeActive's core purpose and to build our strategy from that fundamental DNA, which gradually evolved during the association's 20+ year history. Writing the first parts of EuropeActive's strategy for 2020 – 2025 while facing the strong headwinds of the pandemic in early 2020 these existential self-critical reflections about our association's core purpose and organisational strengths and weaknesses were important to conceiving a strategy for the future which would root us in our sector's great historical achievements while envisaging our future role in society far beyond the pandemic.

These reflections helped us, and will continue to help us as we move forward, building strategic bridges connecting the best and brightest ideas of the past with the realities of the future. While keeping EuropeActive's inner purpose consistently steady we aim to strengthen existing and build new bridges to new stakeholder groups, enlarging the ecosystem we represent, and significantly expand our industry's market, in the years to come.

And what is then EuropeActive's inner purpose? As the association's name says it is making Europe physically active for its inhabitants' health and wellbeing. EuropeActive will fulfil this purpose by being the effective, enabling, representative trade association and unified voice of and for the European fitness and physical activity sector. Our sectoral mission draws on the noble historical tradition of the Greek Olympic games and Roman 'Mens sana in corpore sano' of antiquity and the later public health ideals of modern European academia and democracy.

Connected with the effective contemporary means invented and provided by the fitness and physical activity sector our continent's historical traditions of health through fitness and exercise will achieve future societal impact and reach potentially improving the health and wellbeing of all European

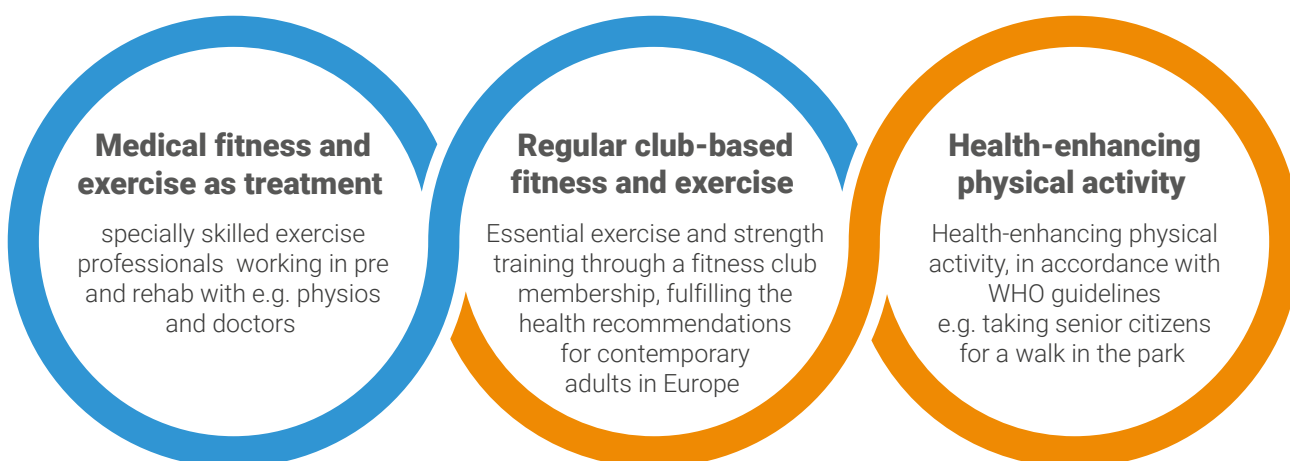
citizens. When considering the current demographic development of Europe's aging population, significant public health challenges caused by sedentary lifestyle habits, and pressured public healthcare systems, it should be clear that our essentiality as trusted providers of health-enhancing physical activity will only increase vastly in the coming years, if we are able to align collectively with the needs and expectations of our societies.

EuropeActive as the sector's enabling, facilitating hub for the future

Being very well aware that ever-changing circumstances and constant uncertainties of the years of the pandemic have been extremely challenging financially and mental wellbeing-wise for large parts of our sectoral ecosystem, we believe it is important for EuropeActive to inspire and facilitate steady gradual, rather than abrupt or radical, transformation of our association and our sector in the coming years. EuropeActive will commit itself to making sure that every actor of our ecosystem can join us on the journey towards the overall goals defined in the Horizon 2025 Manifesto, which are Health, Digital, Community & Standards. We will see it as the European trade association's role to connect, educate, equip, inspire and support our members and stakeholders, as their empowering industrywide hub and meeting place, facilitating the industry's collective journey into a promising future.

For example, when EuropeActive's Manifesto defines our sector becoming a generally recognised health solution in European society it is EuropeActive's responsibility to clearly show how every actor of our ecosystem already is or can play an essential role in that evolution. We have already presented the idea of the The Exercise for Health Spectrum to our industry, which concretely shows how e.g. a personal trainer somewhere in Europe taking her senior members for a powerwalk in nature, fulfilling the objectives of the WHO physical activity guidelines for senior citizens, is part of our sector's position as an essential solution to the most common challenges to public health. These include serious conditions and NCDs, like cardiovascular diseases, type 2 diabetes, and several cancers, but also challenges to mental and social wellbeing, which unfortunately have worsened as a consequence of the pandemic and related measures aimed at social distancing and isolation.

THE EXERCISE FOR HEALTH SPECTRUM



Equally, trainers, exercise physiologists, group fitness instructors etc. working with their members and clients in and around clubs and studios, on the basis of evidence-based professional standards, is part of that evolution, as is medical fitness services consisting of healthcare professionals, like physiotherapists and doctors, working with specially skilled trainers as part of patients' prehab and rehab programmes. More than anything becoming a recognised solution to public health challenges is about how we conceive, present, and conduct ourselves professionally as a sector, e.g. as exercise for health professionals, rather than just providers of sport and leisure activities.

EuropeActive will lead in this evolution through consistently and systematically sharing concrete examples of best-practice from our sector, e.g. at our educational events for our members, through providing research and data via THiNK Active and The European DataHub and through building strategic bridges connecting our industry with the relevant academic, healthcare, government, and political partners we need on our onwards journey.

Our sector's post-pandemic recovery, rebuilding and renewal towards 2025

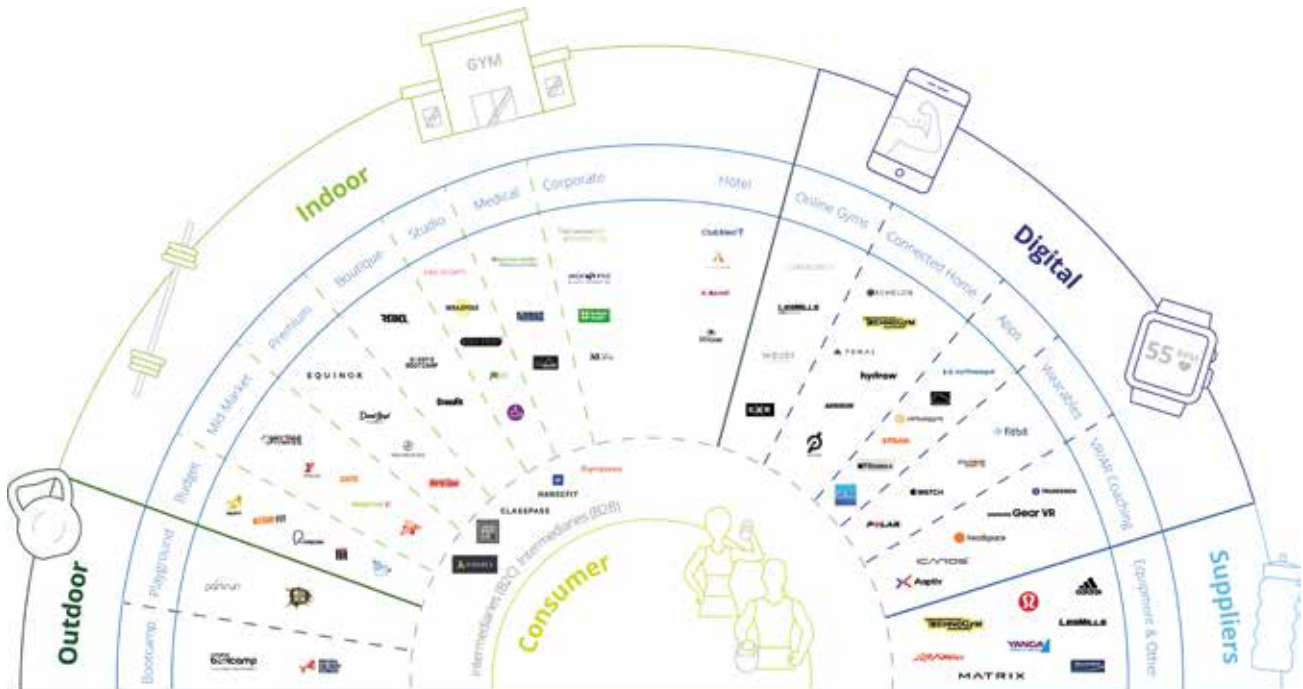
An essential part of EuropeActive's general vision for our sector's future role in society, which is defined in our strategy paper for 2020 – 2021, in our Manifesto and in the strategy paper at hand covering 2022 – 2025, are our ideas and objectives for the industry's recovery and rebuilding after the pandemic. For that reason, it has been particularly important for us that EuropeActive's strategic initiatives and objectives for 2022 – 2025, which point towards our overall Manifesto goals, are accessible and relevant and present concrete realistic recovery and future business opportunities for all actors of our ecosystem.

For example, when we provide educational publications, webinars and event presentations on digitisation and tech solutions it is with the specific ambition to help our members and stakeholders reach more consumers in order to grow our market, as well as to increase our sector's positive health impact and consolidate our essentiality in society. When we promote policies of inclusivity and environmental sustainability under the Community pillar of our Manifesto it is to grow societal esteem for our sector through what we like to call Active Citizenship. And when we have taken ambitious new steps forward with regards to standards for both our industry's people and places, notably exercise professionals and fitness clubs, it is because generally implemented professional standardisation defines the foundation of a mature, well-established sector that is considered trustworthy by the world around us. Our goal is to build a fitness and physical activity sector our workforce is proud of and motivated to build lifelong careers in, being mindful as part of our professional identity, of the positive health and wellbeing impact of our sector in society.

We sincerely hope that it will be clear to everyone reading EuropeActive's strategy for the coming years, which we have called Moving Forward Together – rethinking, rebuilding and renewing for our sector's unity, innovation and growth 2022 – 2025, that we have intended to pave the way towards our association's ambitious Manifesto goals with concrete initiatives and actions, which ensure that our long-term goals are solidly connected to the best of our sector's and our association's past achievements, and properly take into account the cross-sectoral realities caused by the pandemic.

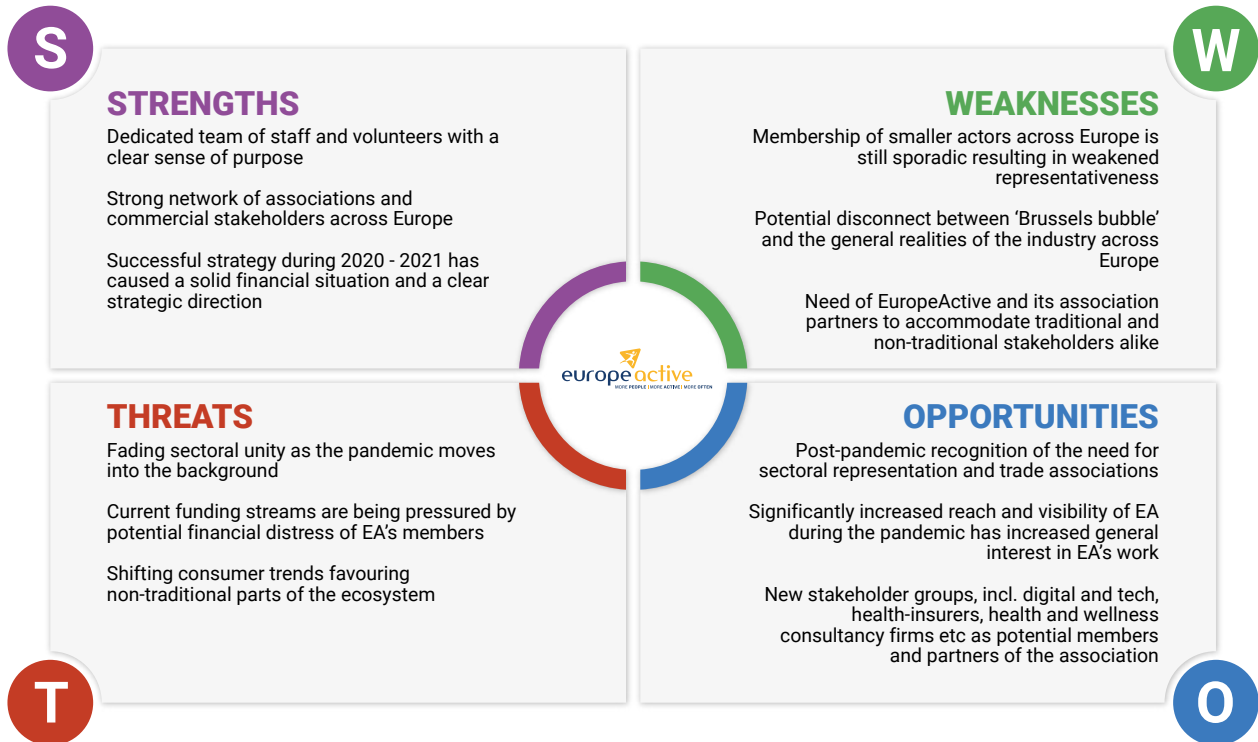
We firmly believe that our strategy for 2022 – 2025 will not only consolidate EuropeActive's representative momentum as the pan-European health & fitness association and united voice of the fitness and physical activity sector in Europe, but will enable us as your continental trade association to lead towards our long-established goal of 100 million fitness club members by 2030, and towards

similarly ambitious growth objectives for the fit-tech, equipment, outdoor and other important parts of our diversifying sectoral ecosystem. All actors thereof working towards the grand vision of making more people, more active, more often.

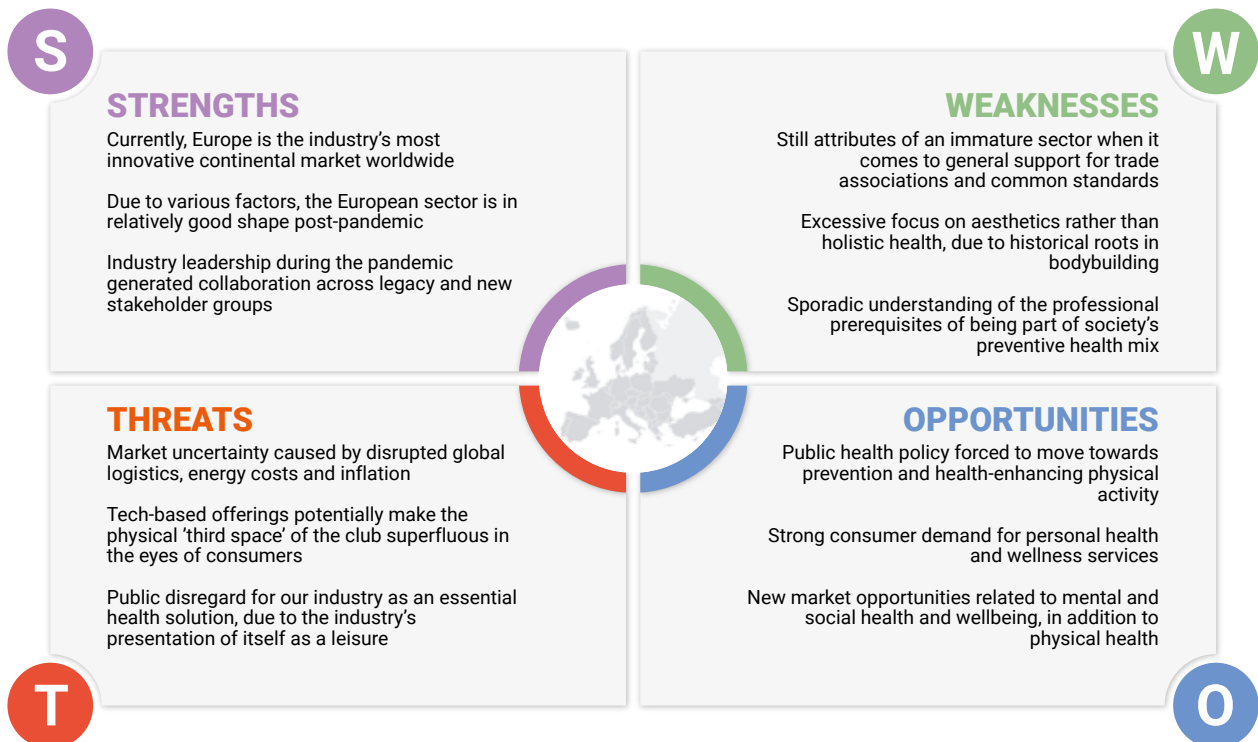


In the following five chapters of this strategy paper we will present a large number of specific initiatives, which we hope you, EuropeActive's members and stakeholders, will find both innovative and directly relevant for our industry's evolution in the coming years, and for EuropeActive's ability to serve and support you to the best of our ability on the journey towards our Manifesto goals of becoming a generally recognised solution to common public health challenges, to reach more consumers and end-users, and enhancing their experiences around fitness and exercise, through digital and tech means, to constantly increase the trust and confidence of society in our sector through social outlook, outreach and responsibility, and to ensure and improve quality-assurance in our sector through proper industry standards for our industry's professionals and places of business. Be they physical or virtual.

EuropeActive SWOT Analysis



The European Fitness Sector SWOT Analysis



Being the most effective fitness and physical activity trade association

In order for the European fitness and physical activity sector to reach these ambitious goals we need a both strong and attractive common unifying hub and meeting place facilitating cross-sectoral dialogue, collaboration, best-practice sharing and coordination. EuropeActive intends not only to keep that very role for our sector in Europe, but frankly aims to be the world's leading fitness and physical activity trade association, successfully driving the future development of our sector forward and becoming as strong as possible, in order to support our members and stakeholders effectively on the way ahead.

We believe that three principles are key to being that leading trade association for our sector: accountability, representativeness, and transparency, which we will strive to consistently demonstrate as we move forward and constantly improve EuropeActive's sectoral mandate.

We will anchor our association's daily practice in these three principles of good governance through ensuring our members' access to EuropeActive, through the strength of the association's General Assembly and Board ensuring our member democracy, through our reliable reporting to and informing of EuropeActive's members, and through our stakeholder advisory boards reflecting the diversity of our ecosystem.

We regard the close trust-based dialogue and ongoing interaction EuropeActive has had with its members and stakeholders during the pandemic as essential to reaching the goals for the association and our sector presented in the following chapters, and we therefore appeal to you to get in touch with EuropeActive's leadership, Board Members and Team in Brussels to share your feedback, ideas and insight as we work together towards our goals for the future.

On behalf of EuropeActive's Board Strategy Committee, we wish you happy reading, we thank you for your partnership and support, and look forward to collaborating with you to fulfil our sector's most promising future potential.

April 2022



Alfonso Jimenez and Jennifer Halsall-de Wit,
Members of the Strategy Committee of EuropeActive's Board



OUR MISSION

“to promote the interests of all organisations, which work towards getting more people more active more often.”

OUR VISION

“to be the leading European voice for the fitness and physical activity sector.”