



2020-2021

CRITICALLY RETHINKING FOR SUCCESSFUL REOPENING OF THE EUROPEAN FITNESS AND PHYSICAL ACTIVITY SECTOR

**JUNE
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01 SUMMARY

CRITICALLY RETHINKING FOR SUCCESSFUL REOPENING OF THE EUROPEAN FITNESS AND PHYSICAL ACTIVITY SECTOR

In 2019 EuropeActive started the process of writing a new strategy for 2020-2025, with the plans to launch and present this new strategy at the European Health and Fitness Forum in April 2020. By mid-March the world was in turmoil because of the Covid-19 pandemic. It meant that the EuropeActive Team had to shift gear and focus on informing and assisting the sector to safely operate through and eventually come out of the lockdown.

As more and more countries are seeing their fitness facilities open up, we are now starting to address the vulnerabilities of our sector that this crisis has highlighted. All this culminates in a strategic course bridging our C19 response with our primary 2025 strategic goals. This strategy paper informs you of our initial response to the crisis and our medium-term objectives - making way for the long-term strategising: a process that is set to start again in the coming weeks.

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01 INTRODUCTION

Following a promising start to the 2020's, the Covid-19 (C19) pandemic has resulted in an unprecedented health and economic crisis for European society. The fitness and physical activity sector in particular has seen primary places of business, health & fitness clubs, shut down in most countries across Europe and the financial impact of this will continue to have a negative effect for many months to come. There is however promise of a brighter future. Never before have we seen government and media recognise to such a degree the benefits of activity on an individual's physical, social and mental wellbeing, reliable new studies and data clearly show that a solid majority of fitness consumers and members are eager to return to their health & fitness clubs and European citizens are recognising the approximately 65,000¹ clubs across the continent as important centres or meeting places within their communities.

From the beginning of the crisis EuropeActive (EA) has been fully committed to informing and assisting our sector to safely operate through and eventually step out of the shadow of C19. At the same time we have been addressing more long-term sector vulnerabilities and repositioning both professionally and image-wise in preparation for the vast opportunities a post-C19 future may offer. From the outset of addressing the challenges of C19 the EuropeActive team has maintained the ambition to not only to inform and assist our members and stakeholder to crisis-manage effectively, but also to facilitate the gradual movement of our sector towards a future where we hold a recognised place in European society as important providers of not only physical, but also social and mental health and wellbeing in our communities.

This ambition is reflected in our internal working title for the C19 period 'critically rethinking for successful reopening' aiming not at getting back to the old normal as quickly as possible, but adapting to the necessities of a new normal influenced by C19 and unlocking the potential of a future in which our sector is regarded by society and policy-makers as an important element of public health in addition to our traditional position with sport and culture policy. During C19 actors of all sizes across our sector ecosystem have experienced the vital role that well-functioning sector associations play in securing the best possible conditions for our businesses. In close collaboration with our national association partners in the different European countries EuropeActive intends to use this broad support to carry on and successfully lead the European fitness and physical activity sector into the new decade of the 2020s.

02 IMMEDIATE RESPONSE TO C19

The immediate response of EuropeActive's to C19 was to consult all our principal stakeholder groups through online roundtables in order to identify the immediate needs of our sector and define how we could most sensibly and effectively deliver towards those needs. Through roundtables with our national association partners across Europe and periodical consultative meetings with EREPS's fitness professionals and our accredited training providers, we created structures for systematically sharing and disseminating best-practice and initiated weekly educational webinars with sectoral experts addressing the essential questions of our different stakeholder groups. This included operational guidance and standards for fitness and health clubs.

Meeting and coordinating regularly online while moving through the crisis has been of central importance to our response and as a pan-European sector association this has taught us new ways of consulting and engaging our principal stakeholders on a continuous basis.

As the C19 crisis escalated in Europe we were in the middle of defining EuropeActive's 2025 Strategy and we had to change focus to channel the majority of our resources into addressing the immediate demands and challenges ahead of our sector and our association. But the fundamental mission, vision, values and organisational objectives, which had been defined at the end of 2019 as part of our strategic revision were kept as the overall framework of our response to C19.

Our revised mission reads: **"EuropeActive's mission is to promote the interests of all organisations, which work towards getting more people more active more often."** And EuropeActive's new vision: The vision of EuropeActive is **"to be the leading European voice for the fitness and physical activity sector."**

Possibly more than ever before, while working through the challenges of C19, EuropeActive's Team has found purposeful meaning in our very name, Europe + Active, representing who we are, where we come from, who we represent and we are responsible to, as well as what we do professionally².

Our organisational restructuring under the strategic revisional process initiated last Autumn was also continued during the months of C19 ensuring unified focus of our Board and team in Brussels to specifically deliver value for our different stakeholder groups across our sectoral ecosystem. This has been of immense value for EuropeActive's representativeness as the European voice of the fitness and physical activity sector

An initial consultation with principal stakeholder groups including fitness and health club operators and suppliers, exercise professionals and training providers, academia providing science and research relevant for our sector, national sector associations, EU and national authorities working with our sector, WHO and relevant external NGOs, and sectoral press and media outlets defined how EuropeActive would engage with our respective stakeholders both short and long-term.

As part of this process we outlined five headlines under which we would deliver information and assistance for effectively operating through C19, reopening, and adapting to the post-C19 future:

1. Health- and socio-economic arguments for fitness and exercise based on scientific evidence and research,
2. Communicating with consumers, members and stakeholders,
3. Standards and guidance for safely operating and reopening under C19,
4. Education and training of exercise professionals for C19,
5. Digital and tech solutions for C19 and 'the new normal'.

Since mid-March our weekly educational webinars, C19 resource webpage, Brussels Bulletin and Active Update has addressed these five overall headlines delivering value to our stakeholders across the sector ecosystem.

03 MEDIUM-TERM OBJECTIVES

3.1 Member Services

As we begin to see the reopening of fitness and health clubs, EuropeActive has set out our strategic course which will bridge our C19 response as presented above with our primary 2025 strategic goals. The crisis has accelerated many processes in this regard and given us many insights, which will adjust a wide range of medium and long-term objectives under our association's 2025 goals. Some of the priorities which have been moved up are our fora for continuous consultation and engagement of stakeholders, which we will use the summer to more clearly formalise. The immediate need for expanding digital skills and infrastructure for our sector generally, as well as within our association itself, has naturally also moved to the top of our agenda. The existential importance of positioning our sector towards public health has been a long-standing priority of EuropeActive but the recent crisis has made the need much clearer to most actors within our industry and the priority has thus been at the top of EuropeActive's list over the past months.

Ten overall headlines for our strategic revision beginning last fall were defined by our Strategy Committee, one of which was new organisational structures for continuous stakeholder engagement. As previously mentioned, this consultative and representative process has been accelerated as part of our response to C19 with weekly or periodical roundtables with our stakeholder groups. We are now starting to formalise the fora for the longer-term representativeness of EuropeActive. In this regard we will launch our permanent CEO advisory board, the President's Council, consisting of the leaders of Europe's largest club operators, with the aim to help EA reposition of our sector towards public health and our positive impact on the physical, social and mental wellbeing of our communities. The President's Council will be defined in greater detail by a Charter of the Council. Three other initial priorities of our first advisory President's Council will be to help commit our sector to continuous upskilling through professional standards and EREPS, to help build digital infrastructure for collecting data from our sector across Europe, and building widespread support for EA's Green Pledge project, improving our sector's collective Co2 footprint. We are currently considering additional future Council's e.g. for suppliers and digital/fitness-tech.

The new President's Council will also advise on the improvement of EuropeActive's Member Services department, delivering concrete value for our sector's operators and suppliers, strengthening comms and marketing strategies, and advising on our future executive educational programme and events.

Strategically it is of high priority for EuropeActive, through our executive events and educational programme, to help training our sector's leaders for post-C19 realities, as well as more long-term opportunities and challenges. Last but not least, our network of operator and supplier CEO's will continue to be of immense importance when it comes to defining and disseminating EuropeActive's guidance and standards for operating through C19 and other operational challenges.

An additional accomplishment of EuropeActive's Member Services team during C19 has been to sensibly adjust and/or postpone several long standing events for our stakeholders e.g. EHFF and ELF including revising and updating topics for C19 realities and developing plans for online delivery of presentations and lectures if necessary. Taking our events online has come with essential digital insight for our Team, which we will use for much broader reach for our educational events and activities in the future. Furthermore, it is our ambition to improve or reinvent our different events for stakeholders, e.g. for business leaders and exercise professionals, into more interactive, engaging, disseminating and impactful educational activities.

Furthermore, digitalisation and fitness-tech has proven to be an existential prerequisite for the fitness and physical activity sector during C19. We already defined, as part of the strategy process initiated after EuropeActive's change of leadership, that our association aims to facilitate and give focus to our sector's digital and tech community at all our major events going forward. Accordingly, we have established an advisory digital steering committee which is currently running our educational webinars on digital and tech, and which will enable EuropeActive to intellectually lead the sectoral debate on digitalisation. The overall headline of this work is More People More Active Through Digitalisation and Fit-Tech.



A very important aspect of digitalisation for EA in the coming years is systematic data collection from across Europe for our educational reports and publications. We critically need solid data, which is not reliant on secondary or tertiary parties, and constant analysis regarding consumer behaviour in our sector. It is crucial that we understand not only consumer behaviour limited to the four walls of clubs, but aim more broadly at our entire ecosystem for fitness and physical activity. Partnership with Eurobarometer and other data-collection partners will be essential in this regard.

The many educational webinars EuropeActive organised for our stakeholders moving through C19, as well as our video-based operational guidance for clubs, underscored the potential of improved digital dissemination channels of our association and thus much wider reach for our core messages. Our team members in EuropeActive Comms are currently revising our dissemination strategy in accordance with the realised potential of digital platforms and channels. As we move into the fall we will be informing and educating our sector via digital platforms and channels alongside more traditional research publications, like the annual European Health & Fitness Market Report (EHFMR).

3.2 Educational Services

Our Educational Services department has been successful in connecting with registered exercise professionals and accredited training providers across Europe, largely through consultative online roundtables, as well as through the EREPS Ambassadors and EREPS Heroes programmes. These programmes will be expanded further over the summer and into the fall. EuropeActive's Educational Services department is centrally important to our collaboration with scientific and academic partners at universities and other research institutions, as evidence-based standards for professional practice, upskilling our sector's workforce for the future, is more important than ever. A strategic priority of our Educational Services team, which was presented around the ISM X in Copenhagen in November, and moved to the forefront of our agenda following C19, is training providers' online delivery of education for exercise professionals, quality assurance thereof, and the exercise professionals' online delivery of services to their members and clients.

Over New Year we defined that we would like to develop our current EA Knowledge Centre into a proper European think tank, an active research and intellectual centre, for fitness and exercise, connecting and aligning us more closely with scientific and academic institutions. This work will be initiated later this year by a consultative roundtable of our academic and scientific advisors and partners. A new scientific advisory board will oversee the development of our current knowledge centre into a European think tank for fitness and physical activity, which will be of central importance to positioning our sector towards public health policy.

Another goal in this regard will be organising an annual European medical fitness summit for stakeholders, leading the debate on fitness and exercise for medical and healthcare purposes, gathering and engaging relevant academia, healthcare professionals, insurers, national associations, public authorities and decision-makers, as well as our sector's operators and suppliers. Our future think tank for fitness and physical activity will unite the academic community across Europe working with our sector, and transform their research into databased, reliable arguments opening doors to future market opportunities. An additional objective of our future think tank and research centre will be to expand the brilliant market research EuropeActive's Team is already conducting in partnership with Deloitte and other partners.

The Educational Services and Projects & Programmes departments of the EA Team have worked hard during C19 to consult training providers and exercise professionals across Europe on the needed adjustments of our current professional standards. This is a process that EuropeActive's Professional Standards Committee of standards experts will conclude later this summer. Furthermore, over the past year our Educational Services and Projects & Programmes departments have been doing the groundwork for a totally renewed accreditation and standards regime, which is not only fit for the future, but will ensure across the board future upskilling of our sector through publicly recognised standards for people and places. This important work is currently being adjusted to C19 circumstances and is scheduled for launch in early 2021.



3.3 EU & Public Affairs and Projects & Programmes

Collaborating and listening closely to our national association partners since the very first days of the current crisis has been incremental to our effective steering through the challenges and delivering value for our local and national stakeholders. The EU Public Affairs and Projects & Programmes departments of EuropeActive have done a fantastic job uniting representatives and leaders of national and trade association partners through periodical online roundtables of the EFAF (European Fitness Associations Forum) community, EuropeActive's family of national and trade associations from across the continent. Our EU & Public Affairs department are currently developing plans for strengthened alliances with our national association partners, incl. dual-membership, more systematic sharing of industry intelligence etc. through the EFAF community. Adjusting our EU funded projects and programmes to C19 realities with meetings of EU institutions and multiple other public organisations being postponed and cancelled meant taking all project meetings online. This has been a tremendous accomplishment by our team increasing our standing with EU decision-makers as well as our national partners who rely on these projects.

EuropeActive's EU & Public Affairs and Projects & Programmes departments are at the forefront of uniting and collaborating with our sector's national and trade associations across Europe, as well as external NGOs in relation to our sector, in order to aggregate and coordinate resources for the positioning of our sector as essential providers of physical, social and mental wellbeing in our communities. For this crucial development to happen across Europe we need a concerted effort, which effectively presents the reliable evidence-based arguments from scientific and research partners to public decision-makers at the national, EU and WHO levels. This calls for an unprecedented coordinated public affairs (PA) strategy developed in collaboration between EuropeActive and our partners in each European country.

A precursor project, which reflects the massive potential of our collective resource of EuropeActive working together with national associations was the **#BeActive Hour** project, which was initiated and built with core partners within a very limited timespan, as the European fitness and physical activity sector slowly began to reopen. Our ambition was to show citizens across the continent the best of our sector and promote physical, social and mental wellbeing through fitness and exercise. The result was an acclaimed pan-European campaign and movement, built in under four weeks, which achieved the support of public and private actors in most EU countries underscoring our sector's readiness to improve the wellbeing of our members and clients after C19.

#BEACTIVE HOUR

#BEACTIVE FOR WELLBEING

#BEACTIVE FOR RESILIENCE

#BEACTIVE FOR IMMUNITY

#BEACTIVE FOR COMMUNITY

Our future European think tank for fitness and physical activity, President's Council of the European sector's largest multi-national employers and our national association partners play crucial roles in the vast collective accomplishment of repositioning our sector towards public health, incl. preventive health, prehab etc., in addition to our traditional position in the policy area of sport and culture. To more clearly define this endeavour for our post-C19 future EuropeActive will write and publish a manifesto with our relevant stakeholder groups.

Equally, EuropeActive has received much positive feedback on our promoting of ESG in the fitness and physical activity sector, or what we like to call Active Citizenship. Under this headline we would like to raise awareness around our sector's many initiatives in environmental protection, social engagement in and responsibility towards our communities, as well as improving our governance structures, particularly in terms of transparency and accountability, and stimulating greater strategic commitment to these principles with actors across our industry. Our new President's Council of European CEOs will play an important role in this regard.

ESG, or Active Citizenship, plays an important role in our sector's ability to position ourselves as valued social meeting places, an essential third place in life after home and workplace, of physical, social and mental wellbeing in our communities and we intend to unite and promote all relevant actors to make sure that society at large are aware of our sector's many great examples of social outreach and inclusion. Through Active Citizenship we will demonstrate to the world how individual physical, social and mental wellbeing leads to empowered citizens and stronger, healthier, happier communities, as promoted by the 17 UN Sustainable Development Goals.

The ESG of our sector should of course be seen in addition to the seemingly obvious, although too often overlooked, fact of our sector's impressive contribution to the European economy, e.g. through creating jobs promoting healthy lifestyles, and to the health and wellbeing of approximately sixty-five million European club members³, as well as the many more consumers of our sectoral ecosystem's countless other products and offerings. We are excited about our collaboration with the WHO in this regard, not least in terms of establishing a Global Register of Voluntary Contributions of great ESG cases from our sector.

C19 has taught us all that travelling across our continent and the world for meetings etc. can be reduced significantly by means of online tools and platforms. Under our Active Citizenship heading, we intend to motivate our sector, starting with our own association of course, to capitalise on these new digital competences and improve our green accounts through a Green Pledge for the Fitness & Physical Activity

Sector. We have identified a widespread desire of the European fitness and physical activity sector to reduce our Co2 emissions and improve our carbon footprint. Over the coming year we will present our platform for individuals and organisations to commit to our sector's Green Pledge.

Just before C19 happened, our Board initiated the EuropeActive Ambassadorship programme for extraordinarily experienced former EA officials, who have an excellent standing with our industry, for which the Board later appointed Gabriel Sáez and Herman Rutgers as our two first EA Ambassadors. Gabriel and Herman have been appointed to support EuropeActive's revised PA strategy and repositioning towards public health, building our President's Council and expanding our CEO network across Europe, as well as strengthening EuropeActive's collaboration with national partners in selected EU countries.

Finally, in line with our association's *raison d'être*, which is reflected in its name, being European and making our continent physically active as our profession⁴, we collaborated with EuropeActive's members and partners to achieve a geographically, competence and gender balanced Board at the General Assembly in April. Our new Board is indeed highly representative and capable, with a strengthened mandate for European national associations. Both our Board and Team in Brussels are united in delivering on EuropeActive's objectives more creatively and more effectively than ever before. In part because of our Board members' contributions to EuropeActive's development through standing committees going forward and through our new consultative connections to our stakeholders.

References

¹ Europe Health & Fitness Market Report 2020

² EuropeActive's mission, vision, values etc.: <https://www.europeactive.eu/about-europeactive>

³ Europe Health & Fitness Market Report 2020

⁴ EuropeActive's mission, vision, values etc.: <https://www.europeactive.eu/about-europeactive>

⁵ Horizon 2030 – publication for European Health & Fitness Forum





04 CONCLUSIONS

Apart from presenting new goals for our sector's development in the new decade, including reaching 100 million European club members by 2030⁵ and moving towards and beyond 20% market penetration, our strategy process defining EuropeActive's direction towards 2025 first and foremost addresses how we aim to build the strongest possible sector association for the European fitness and physical activity sector.

We want to be, as our vision clearly states, the European voice for our sector, and all of our work must clearly reflect our name, EuropeActive, who we are, and what we do, who we are responsible to, and what we are responsible for. This has to be reflected across the departments and business areas of our association so that no member or stakeholder is ever in doubt about EuropeActive's ambition and ability to be the intellectual backbone of our sector, being well-connected and representative enough to unite our principal stakeholders when needed in order to rethink and reposition our sector to effectively meet challenges and opportunities ahead.

We, as the EuropeActive Board and Team, have learned a lot while strategising for and adapting to the challenging circumstances caused by coronavirus and many elements of our strategic planning have been adjusted. But our core mission, vision and values, our main purpose as the European fitness and physical activity sector's collective association and community of stakeholders, are more relevant than ever, as they proved to meaningfully unite and give direction to our sector when C19 threatened us existentially.

Our work continues with implementing the short and medium-term objectives set out above, and we will soon restart our longer-term strategic planning towards 2025. It be clear when we physically or virtually meet for the EHFF in September, where we will present our strategic goals for the coming years in greater detail, that although several means of our priorities have been altered EuropeActive's core ends remain unchanged, above all being *'the leading European voice for the fitness and physical activity sector'*.

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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.”